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ABSTRACT

This curriculum guide for teacher-coordinators is designed to provide a course of study in distributive education (Distributive Education II) in Oklahoma. Content is in nine sections with each section consisting of one or more instructional units: (1) Orientation (Introduction to Distributive Occupations, DECA), (2) Survival Skills (Job Application and Interview, Handling Money, Cash Register, Shoplifting Prevention, and Communications), (3) Human Relations, (4) Selling (Pre-Approach, Approach, and Determining Needs; Presentation; Overcoming Objections, Close, Suggestion Selling, and Reassurance), (5) Display, (6) Advertising (Advertising Media; Advertising Layout), (7) Merchandising, (8) Store Organization, and (9) Economics (Economics of Free Enterprise; Government and the American Market). Each instructional unit contains lesson plans for several days and includes some or all of the following color-coded components: Performance objectives (unit objective describing the general outcome by completion of the unit and specific objectives delineating steps to reach the unit objective), suggested activities for teachers and students, information sheets (cognitive content), visual aides (transparency masters), assignment sheets and answers (individual and/or group learning activities providing direction to study), job sheets (procedures for skill development), tests, and test answers. Student materials are available and contain everything but test answers, answers to assignment sheets, and suggested activities. (EM)

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DISTRIBUTIVE EDUCATION II

Course of Study

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For the Division of Distributive Education
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OKLAHOMA STATE BOARD OF VOCATIONAL AND TECHNICAL EDUCATION
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FOREWORD

This publication is designed to provide a course of study in distributive education in Oklahoma. The student of today, who will be the business person of tomorrow, needs to be a well-educated individual who is constantly seeking information on which to base the many decisions he/she is required to make. The purpose of this course of study is to assist the DE teacher-coordinator in improving instruction in Distributive Education II in Oklahoma. Appreciation is expressed to the many individuals who helped in the development of this publication. Teaching of distributive education should become more effective with the use of this course of study.

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USE OF THIS PUBLICATION

I. Terminology

A. Unit objective--General outcome desired by the completion of the unit

B. Specific objective--Step to reach the unit objective

(NOTE: Studies have shown that students learn more when specific behavioral objectives are used.)

C. Instructional materials section--List of the contents contained in each unit

D. Job sheet--Step-by-step procedure for completing a certain skill

E. Unit of instruction--Lesson plans for several days

II. Color code

A. White--Objectives, suggested activities, transparency masters

B. Green--Information sheets, student copies of transparencies

C. Tan--Assignment sheets

D. Blue--Job sheets

E. Yellow--Tests

F. Pink--Answers to tests, answers to assignment sheets

III. Page numbering system

Each section is denoted by a letter. For example, "Orientation" is Section A and "Survival Skills" is Section B. The units within each section are then numbered consecutively. An example of a page number is DE II - 1-A. This shows that this is the first page of Section A in DE II.

IV. Meaning of performance terms used in objectives

A. Name, list, select from a list--To memorize or to give total or partial recall

(NOTE: There is some cognitive knowledge which is necessary in order to communicate in the business world and which is best learned by memorization.)

B. Identify--Used with a picture or transparency to learn association, to label parts, or to point to parts

C. State a rule--To give a formula

D. Apply a rule--To work a formula that has been provided; used for problem solving and will often have a corresponding assignment sheet which provides appropriate practice

E. Describe--Requires the student to think and organize his/her thoughts about all the information related to the objective

F. Distinguish--Requires the student to classify two or more things

G. Arrange in order--Used when sequence of steps is important

H. Construct--Used when the finished product or results is important

I. Demonstrate--Used when it is desirable to watch the student perform a task; one of the highest levels of student performance

V. Methods of disseminating material

A. Material may be given out a unit or page at a time to keep the material always new for the students. Some teacher-coordinators ask students to furnish three-ring binders for the units while studying a particular unit. This is more convenient for taking the material home to study. The units are then placed in the larger binders, which may be purchased at cost from CIMC, upon completion of the unit. Some teacher-coordinators have stored the materials by units in filing cabinets or stored them by units in labeled binders, once again available from the CIMC.

B. All the units may be given out at once if desired.

C. Student materials should be provided for each student for best results. They may be purchased in-state for less than a teacher-coordinator can reproduce the materials, especially when the teacher-coordinator's time is considered. Student materials contain everything but test answers, answers to assignment sheets, and suggested activities. The students should be allowed to take the materials home at the end of the year.

VI. Preparing to teach

A. Read suggested activities in advance of teaching the units so supplemental materials can be obtained, audio-visuals prepared, and outside resources contacted.

B. Supplement the objectives by supplying the "why," personal experiences, and current information from newspapers and magazines, such as *Chain Store Age, Progressive Grocer, Food Service Marketing, Advertising Age,* and *Display World*.

C. Prepare for each unit by deciding how each objective can best be taught.

D. Allow students or teacher's aides to prepare teaching materials. For example, students may prepare mobiles, crossword puzzles, and word-a-grams. Students better accept things they have been involved in preparing and planning.

E. Divide the class into groups and have each group prepare a different technique for presenting assigned objectives. For example, one group may prepare mobiles and another group prepare word-a-grams. Rotate the methods among the groups. Learning will take place as they prepare teaching instruments for the rest of the class to use.

VII. Teaching methods

A. It is a challenge to keep students motivated when teaching cognitive knowledge. Use these examples as a stimulus for ideas or use them as a checklist to keep from getting in a rut and using only the lecture method.

B. It is recommended that at least two different teaching methods be used per hour since the average attention span is twenty minutes.

C. Basic core curriculum allows teacher-coordinators to manage the classroom better and to wisely use their preparation time to develop motivational and teaching techniques.

D. Video-tape guest speakers, field trips, sales demonstrations, job interviews, and role playing.

E. Use positive rewards. Greet students individually each day by name and with a smile. Use words of praise more than words of criticism.

F. Have students with additional experience help those students who miss objectives on the pretest or posttest.

G. Keep objectives before students by using a variety of colorful methods. For example, students may write objectives on construction paper and hang them on a clothesline.

H. Place objectives on parts of a puzzle which have been cut from poster board.

I. Write objectives on pieces of construction paper which are removed from a poster board to reveal a collage or pictures of examples of the subject matter discussed.

J. Write answers to the objectives in the students own words on the opposite side of the construction paper used. Students should then be responsible for beginning the class discussion as they display their assigned objectives on the clothesline, puzzle part, or poster.

K. Have students prepare crossword puzzles using terms, lists, and concepts found in the unit and then exchange the puzzles with other class members. This is a good way to review a unit, introduce a unit, or stimulate discussion while covering the information.

L. Prepare word-a-grams with terms hidden in a grid containing many different letters. Students are given the definitions and then must know the terms in order to find the terms hidden inside the grid.

(NOTE: A grid which may be duplicated and used as a guideline for preparing crossword puzzles and word-a-grams has been provided at the end of this section.)

M. Make telephone code puzzles using terms, lists, and concepts found in the unit. Spell the words using corresponding numbers on the telephone dial. For example, "cat" could be coded "118." Students then decode the terms.

N. Have students unscramble letters of words which have been mixed up. This is another excellent method of presenting terms, lists, and key words.

O. Use TV game shows to motivate students. Television related games may be used as a review at the end of a discussion period, lecture, or textbook assignment. The teacher-coordinator may change game rules to fit the size of the teams.

(NOTE: It has been proven that teaching methods which involve more of the senses increase learning through association.)

P. Play "Password" by dividing the class into teams and rotating the turns among the team members. One word synonomous clues are given for the terms and concepts which have been written on slips of paper. The teacher-coordinator may devise a scoring system. The students will often play these games by themselves when they have a few minutes left during a period.

(NOTE: Grades will often improve, too!)

Q. Play "Jeopardy" by having students select categories and questions within the categories with values between 10 and 100 points.

R. Play "Concentration" by matching two terms and defining the terms to gain team points. The terms may be placed on a peg board or bulletin board. Terms may be taken from the terms and definitions in the unit, the listing objectives, or key words taken from broader concepts. The terms may be written on 3x5 index cards or colorful paper. Students will "help" one another, but that's alright as long as learning is taking place.

S. Play "Hollywood Squares" by having a panel of students answer questions and bluff answers they do not know. Two players may gain boxes on a tic-tac-toe board, which is placed on the chalkboard on a transparency master, by agreeing or disagreeing with the panel's answers and bluffs.

T. Play sports games, such as football, baseball, or track. Bases and fields may be drawn and placed on bulletin boards. Tie this method of asking review questions in with local sporting events which are of interest to students. For example, the "men" or tokens may be made using school colors and opposing team colors.

U. Play "Bingo" any of 75 ways by having students place terms in any of the boxes on the "Bingo" card that the student desires as the class discussion is taking place. During the review, the terms are marked out as the teacher-coordinator gives clues and the students recognize the terms from clues. The "Bingo" card may be any size, such as four squares tall and four squares wide or five squares tall and five squares wide.

V. Decorate the room. Have students make bulletin boards or place posters on walls and doors.

W. Make transparencies.

X. Invite guest speakers.

Y. Use role playing.

Z. Act out terms by playing charades.

AA. Have students answer questions by repeating all previous answers given beforehand as well as their answers. Learning takes place through repetition.

BB. Make a stick figure on a hangman's noose by adding a part to the stick figure each time the student gives an incorrect response to review questions. When the stick figure is complete the student is "out."

CC. Use the "who do you trust" questioning technique where a student may answer questions or call on someone else to answer for him/her.

DD. Answer roll call by giving answers to questions.

EE. Write questions, role-playing scenes, and personal problems on slips of paper. Have students select the situations from a can or box. The student then acts out the role-playing situation or begins the class discussion. This is great for using peer group pressure in a positive way.

FF. Arrange field trips for small groups with related interests.

GG. Let "Concentration" board cards and "Password" cards double as flash cards. Advanced students may use flash cards to help other students learn an objective or to catch up with the rest of the class after being absent.

HH. Have students make mobiles from clothes hangers and construction paper with pertinent information placed on the different parts to decorate the room and introduce a unit.

II. Use job sheets only after a demonstration by the DE teacher-coordinator. Students may be rotated through these activities if equipment or time does not allow students to complete these activities all at one time.

VIII. Curriculum and coordination duties

Information sheets may be used for coordination activities and advisory committee conferences. For example, it would be helpful for the teacher-coordinator to find out the cash register procedures, selling approaches, and other sales procedures desired by each student's training station.

IX. Curriculum and student recruiting

The job interview unit should be reviewed in the spring as students graduate. Perhaps a seminar could be prepared for all graduating seniors and/or as a requirement for all new students entering the program. This is an excellent service and student recruiting device.

X. Taking notes

Space is provided in the margins for students and teachers to add notes that supplement, localize, and personalize each unit.

XI. References

References usually are found on the state adopted textbook list. They should be used by the teacher-coordinator to supplement his/her knowledge of the subject area or to help students with a particular interest or occupational objective in the area covered.

XII. Testing and evaluation

A. Tests may be written or oral.

B. It is recommended that the tests provided in each unit be divided into shorter tests covering three or four objectives at a time and given soon after those objectives have been covered in class.

C. If objectives have been added, deleted, or changed be sure to make the changes on the test.

D. Copies of the test may be used as study guides or open-book assignments prior to the actual testing.

E. Objective sheet or unit test may be used for a quick pretest. If the students already know the information covered by an objective, that objective may be skipped and not tested on any further. If only a few students do not know an objective, the students with broader experience may help catch those students up with the rest of the class without spending class time on that objective.

F. A selection of questions from the units covered may be used for final tests at the end of each term if desired.

G. The acceptable response on a unit test, eighty-five percent in most units, may be raised or lowered to fit the topic or students' ability levels. For example, it may be desirable for students to score 100% on units dealing with safety and handling money. It is hoped that teacher-coordinators will work with students until they can achieve at least average or above average scores. It should be remembered that the percentage applies to the overall score, not to each individual question. Also, the test scores should be used along with the teacher-coordinator's observation of the students demonstrating the desired skills for the final unit grade.

H. Assignment sheets may be graded if desired, but most teacher-coordinators use a "pass-fail" or "completed-not completed" system.

XIII. Questionnaire

The following questionnaire should be used with the "Introduction to Distributive Occupations" unit and as an aid for interviews, guest speakers, and field trips. The questionnaire may be reproduced for student use.

QUESTIONS FOR RESOURCE PEOPLE

1. What are your duties?
2. What are your working hours?
3. Do you sometimes have to work overtime?
4. Do your duties vary from day to day?
5. Do you wear special clothing or shoes on the job?
6. What equipment, tools, machines, supplies, or instruments do you use?
7. What are the working conditions?
    a. Mostly indoors?
    b. Mostly outdoors?
    c. Noise?
    d. Temperature?
    e. Working with individuals?
    f. Working with groups of people?
    g. Working with people who are under emotional stress?
    h. Working with professional people?
    i. Can get clothes and/or hands dirty?
8. Which school subjects have been most helpful to you?
9. In what ways do others depend on the work you do?
10. In what ways do you depend on other people to help do your work?
11. How does society benefit from your work?
12. What kinds of interests, talents, and abilities would tend to help a person be successful in your field?
13. What are the physical demands of your work?
14. What personal qualities are important to your work?
15. What caused you to enter this field?

16. How long did it take to reach your present position?

17. What steps did you take to reach your present position?

18. What are the rewards from this type of work? What are the disadvantages? Are there any hazards?

19. What educational training is required or helpful?

    a. High school?

    b. Trade or technical school?

    c. College?

    d. On-the-job training?

    e. Company training programs?

20. What jobs could young people do to help prepare them for this kind of work?

21. What general salary ranges, profit sharing programs, or savings programs are typical?

22. What fringe benefits, such as vacation time, sick leave, insurance, and educational leave, are typical?

23. What are the starting salaries in this type of work?

24. Are there opportunities for advancement?

25. Is there any travel involved with the job?

26. How will technology and automation affect a career in this field?

27. When are people fired or layed off in your field?

28. In what other areas can a person use the knowledge and skills acquired in this occupation?

29. Is your work at all seasonal? Is it limited to any geographical areas?

30. What are some legal regulations you must know?

    a. Labor laws?

    b. Licenses?

    c. Interstate or international trade regulations?

    - d. Tax laws?
    - e. Insurance laws?
    - f. Veteran's requirements?

31. Are there any qualifications dealing with age? Height? Weight? Marital status?

32. Did any of your leisure activities increase your ability to get this job or help you perform better on this job?

33. Do you have to make a lot of decisions on your job?

34. What kind of activities are you able to be involved in outside of work?

    - a. Church activities?
    - b. Civic and/or fraternal organizations?
    - c. Professional associations?
    - d. Country club?
    - e. Sports?
    - f. Arts?
    - g. Vacations?

35. What technical knowledge does a person in your profession need to know?

36. How much information is needed by your customers?

37. What kind of paper work is involved in your job?

38. Are you responsible for expensive items?

39. Do you need to be concerned with product or service promotion?

40. What conditions would cause a business in your field to close?

41. Is there anything we need to know about your job that has not been asked?

INTRODUCTION TO DISTRIBUTIVE OCCUPATIONS
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to list the advantages and disadvantages of distributive education training, to state standard work rules, and to select suggestions for getting along with persons with whom an employee has contact on the job. He should be able to formulate an occupational objective. This knowledge will be evidenced by an overall score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with distributive occupations to the correct definitions.
2. List advantages of DE to the student.
3. List adjustments which a student must make upon enrolling in the DE program.
4. Select from a list those things a new employee should do the first week on the job.
5. Select from a list ways a student can get along with the supervisor.
6. Select from a list ways a student can get along with his co-workers.
7. Select from a list ways a student can get along with customers.
8. Discuss the characteristics of a good employee.
9. State the work rules under each of the following broad categories: punctuality, neat appearance and appropriate clothes for the job, visiting on the job, missing work, keeping busy, poise, and personal management.
10. Select from a list those conditions which a student should meet before quitting a job.
11. Select from a list good study habits.
12. Discuss work rules related to various situations.
13. Formulate an occupational objective.

INTRODUCTION TO DISTRIBUTIVE OCCUPATIONS
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

  A. Give pretest using objective sheet.

  B. Order films and filmstrips.

  C. Prepare a local DE program rules and regulations brochure to be read and signed by the parents.

  D. Provide student with objective sheet.

  E. Provide student with information and assignment sheets.

  F. Make transparencies.

  G. Provide directories, SBA pamphlets, VIEW materials, and "Occupational Briefs" for students to find pertinent job information.

  (NOTE: VIEW materials are available through the Oklahoma State Department of Vocational and Technical Education, 1515 West Sixth, Stillwater, Oklahoma 74074. A catalog containing "Occupational Briefs" may be ordered from Chronicle Guidance Publications, Inc., Monavia, New York 13118. The cost is $.50 per job.)

  H. Discuss unit and specific objectives.

  I. Discuss information and assignment sheets.

  J. Give test.

  K. Reteach if necessary.

  L. Test again until minimum standard is reached.

II. Student:

  A. Read objective sheet.

  B. Study information sheet.

  C. Take notes.

  D. Complete assignment sheets.

  E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1--Distributive Education: A Three-Legged Stool

    2. TM 2--Direct Distribution

    3. TM 3--One Middleman

    4. TM 4--Two Middlemen

    5. TM 5--Three Middlemen

  D. Assignment sheets

    1. Assignment Sheet #1--Discuss Work Rules

    2. Assignment Sheet #2--Formulate an Occupational Objective

  E. Answers to assignment sheet

  F. Test

  G. Answers to test

II. References:

  A. *Career Education.* Chamber of Commerce of the United States, 1615 N.W. H Street, Washington, D.C. 20062.

  B. Superintendent of Documents. *Dictionary of Occupational Titles.* U.S. Government Printing Office, Washington, D.C. 20402.

  C. *Occupational Guidance.* Minneapolis, Minnesota: Finney Company, 1974.

III. Other materials:

(NOTE: Only Oklahoma teachers may order films and filmstrips from the State Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth Avenue, Stillwater, Oklahoma 74074. Out of state teachers may purchase and/or rent materials from the addresses listed.)

A. Films:

1. "Your Job: Fitting In." Available from Coronet Films, Coronet Building, 65 East South Water Street, Chicago, Illinois 60601.

2. "Your Job: Good Work Habits." Available from Coronet Films, Coronet Building, 65 East South Water Street, Chicago, Illinois 60601.

3. "Your Job: You and Your Boss." Available from Coronet Films, Coronet Building, 65 East South Water Street, Chicago, Illinois 60601.

4. "Keeping Your Job Is Work." Available from Dibie-Dash Productions, 4949 Hollywood Boulevard, Suite 217, Hollywood, California 90028.

B. Filmstrips:

1. "How to be a Better Employee." Available only to Oklahoma teachers from the State Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth, Stillwater, Oklahoma 74074.

2. "Your First Week on the Job." Available from Guidance Associates, Pleasantville, New York 10570.

INTRODUCTION TO DISTRIBUTIVE OCCUPATIONS
UNIT I

INFORMATION SHEET

I. Terms and definitions

  A. Distributive education--Vocational course in marketing and distribution consisting of on-the-job training, classroom instruction, and DECA activities (Transparency 1)

  B. Vocational education--Courses which specifically help a person prepare for a career

  C. Marketing--All the activities involved in getting goods and services from the producers to the consumers

  D. Distribution system--Channels through which goods and services get from the producers to the consumers (Transparencies 2, 3, 4, and 5)

  E. Consumer--Person who finally uses a product or service; often the same person as the customer or the one who makes the purchase

  F. Cooperative vocational education program--Instructional program where students receive school credit for on-the-job training as opposed to project classes which provide training mostly through classroom projects

  G. Training station--Business which cooperates with the school to provide training and learning experiences for students enrolled in cooperative vocational education programs

  H. Training station sponsor--Employer or supervisor responsible for training and evaluating students enrolled in cooperative vocational education programs

  I. Occupational objective--Goal for possible future career

  J. Group instruction--General classroom instruction needed by everyone in marketing and distribution

  K. Individual instruction--Instruction directly related to the student's occupational objective and on-the-job training

  L. Job record sheet--Form used in DE to keep a record of hours worked, wages received, and duties performed on the job

II. Advantages of DE to the student

  A. Receives one to three hours credit--Credit is based upon classroom instruction, on-the-job training, and DECA activities

  B. Graduates ready to enter the field of marketing on a full-time or part-time basis and/or to continue his/her business education in a college, company training program, or specialized school

INFORMATION SHEET

C. Gains good references for future jobs

D. Earns money while learning

E. Receives satisfaction in helping other people

F. Learns to accept supervision and to work with other people

G. Advances faster on a job than other workers without training

H. Finds much is expected of him/her from teachers, parents, supervisors, and co-workers

I. Develops leadership through DECA activities

J. Relates classroom instruction and experiences on the job

K. Becomes aware of the exciting opportunities in the field of marketing

L. Learns what he/she wants and does not want in selecting a career

M. Has the opportunity to experience success

N. Shares the prestige of being accepted in a training program with high standards, reputation, and support from major companies

O. Often receives discounts on store merchandise

P. Can apply general business principles to many areas of his/her personal life

Example: Salesmanship, promotion, forming objectives, human relations, balance and color coordination, grooming and personality development, problem solving techniques, budgeting, basic math

Q. Receives guidance on problems before the problems become major areas of concern

III. Adjustments which a student must make upon enrolling in the DE program

A. Must limit participation in some school and social activities

B. Works over holidays, at nights, and on weekends

C. Provides own transportation to work

D. Accepts starting wages that may not be as high as starting salaries in other fields

INFORMATION SHEET

E. Budgets his/her time in order to have time to study other subjects

F. Adjusts class schedule

G. May sometimes have to begin training in an indirectly related job because of limitations due to licensing, age, training, and time

Example: A student whose occupational objective is to be an insurance salesman may receive sales training in a department store, or a student with the occupational objective of an airline stewardess may begin training as a waitress

IV. First week on the job

A. Refer to supervisors and older co-workers as Mr., Mrs., Miss, or Ms. until instructed differently

(NOTE: When uncertain about how friendly you should be at first, a good rule of thumb is to be slightly more formal than overly friendly.)

B. Ask the supervisor about lunch and/or dinner breaks if they are due

C. Do not ask about coffee break times as the supervisor might think the new employee is more interested in time off than in working

D. Ask questions if instructions, store policies, and salary information are not clear

E. Repeat instructions to the person relaying information to make sure the information was understood correctly

F. Write down information that is hard to remember

G. Ask "Did I answer your questions?" when giving information to other people

V. Ways a student can get along with the supervisor

(NOTE: A good supervisor corrects and makes suggestions when a student trainee does something wrong or in a way that is not best for business.)

A. Accept the authority of the supervisor to have things done his/her way

B. Do things to show the supervisor that a DE student/trainee is dependable

Examples: Keep all promises and complete all duties on time

C. Immediately ask the supervisor for more responsibilities when all assigned duties are completed

(NOTE: A recent survey shows that 55 percent of students in cooperative training programs need to improve in this area.)

INFORMATION SHEET

D. Do not appear to flirt with anyone while on the job

E. Handle merchandise and supplies respectfully

(NOTE: These represent an investment in the business. Soiled merchandise and wrinkled plastic bags cause products to be marked down.)

F. Do not pretend to know all about the business

(NOTE: Young, new employees who appear to think they know all there is to know are considered smart-alecky and may not last long on a job.)

G. Learn from all supervisors, both the good ones and those less skilled

VI. Ways a student can get along with co-workers

A. Know all co-workers by name

B. Introduce yourself to the other employees if the supervisor or another employee does not do so

C. Greet by name or at least smile at the other employees upon arriving for work

D. Say good-bye, nod your head, or wave to co-workers when leaving work for the day

E. Listen, ask questions, and thank the other employees who try to help a new employee

F. Realize that new, young employees may not be able to get by with as much as older, trusted employees

VII. Ways a student can get along with customers

A. Overcome shyness

B. Smile and greet each customer with whom you come in contact

C. Try to remember customers' names, likes, and dislikes

D. Approach customers confidently and sincerely

E. Treat each customer as a guest; the customer is your reason for being in business

INFORMATION SHEET

F. Help each customer with his/her individual buying problem

G. Stay busy within viewing-distance to the "just-looking" customer so the employee may be of service if the customer sees something interesting without otherwise appearing to be pushy

H. Realize that there will be some difficult customers

I. Always be polite, tactful, and honest with customers

J. Never argue with a customer

(NOTE: You can never win an argument with a customer; you may make your point but lose the customer permanently.)

VIII. Characteristics of a good employee

(NOTE: The employer pays the salary and has a right to expect certain qualities in an employee.)

A. Cooperation--Helping other employees if permissible when your duties are completed

B. Initiative--Moving to additional duties which require more responsibility and more difficult skills

C. Honesty

1. Starting work on time
2. Returning from breaks and lunch on time
3. Being productive while at work
4. Not leaving work a few minutes early
5. Not taking stamps, pens, paper, and tools for personal use
6. Not stealing money and/or merchandise
7. Not giving special favors and discounts to friends and relatives without the supervisor's approval
8. Preventing friends from shoplifting from the business

D. Willingness to learn--Approaching a class and job with an open mind will make the tasks more interesting

E. Following directions--Listening and reading instructions will save time and effort

INFORMATION SHEET

F. Dependability--Completing a task on schedule is a sign of maturity and responsibility

G. Enthusiasm--Acting excited and eager about your job will often cause everyone to get more work done quickly and easily

H. Accepting criticism

   1. It is impossible to do everything correctly all the time
   2. Occasionally everyone must accept criticism
   3. Do not make excuses
   4. Look the supervisor in the face and try not to look hurt, sulky, or mad

I. Loyalty

   1. Keep confidential matters such as price margins and cost codes to yourself
   2. Do not participate in gossip and disputes
   3. Do not criticize the business to outsiders
   4. Buy merchandise from your place of business when needed

      (NOTE: Discounts are sometimes available for employees. Your use and recommendation of the store's products and services is excellent promotion.)

J. Sense of humor--Person who can laugh when the joke is on himself/herself will gain the acceptance of co-workers

K. Positive attitude--Looking for what is good and right about something or someone and not always complaining or focusing on what is unpleasant

   1. Create and keep positive attitude
   2. Keep comments positive--Avoid complaining and using words such as "can't," "won't," and "don't"
   3. Look for good things in people, your department, and/or company
   4. Show that you care about your job and future career
   5. Act happy and enthusiastic and you will be happy and enthusiastic

INFORMATION SHEET

6. Do not permit co-workers or supervisors who have negative attitudes to trap you into their way of thinking

7. Do not let home problems and romance problems influence your work

IX. Work rules (Assignment Sheet #1)

(NOTE: Work rules are usually stricter than those in school because a business is primarily involved in making money. Larger companies generally have more rules and stricter rules than smaller companies.)

A. Punctuality

(NOTE: This is the most important rule according to a recent survey of business people.)

1. Arrive five minutes early

   (NOTE: Some companies using a time clock do not allow an employee to punch in early, but a good employee should arrive early even if he/she is not permitted to punch in.)

2. Dress, gather tools, pencils, and salesbooks on your own time

3. Return from breaks on time

   (NOTE: Other people may be waiting for you to return or to complete a task so they may go on break.)

4. Run personal errands on own time

5. Do not be a clock watcher

6. Be willing to work a few minutes overtime without pay unless company policy or the use of a time clock prohibits such action

7. Never rush or walk away from a customer because of break or dismissal time

B. Neat appearance and appropriate clothes for the job

(NOTE: This is the second most important rule according to a recent survey of business people.)

1. Clean hands and nails are important

2. Dangling jewelry may be distracting and bothersome

INFORMATION SHEET

3. Clothing fads, jeans, and t-shirts may not be appropriate dress in all cases

   (NOTE: It may be necessary to purchase special uniforms.)

4. Precaution should be taken against body and breath odor

5. Clean and styled hair is helpful in getting and keeping most good jobs

   (NOTE: The use of nets, caps, wigs, or hair spray may be required for some jobs.)

6. As little make-up as possible is more appropriate for work

   a. Natural shades are better for work

   b. Heavy eye make-up is seldom appropriate for work

   c. Clear complexion is desirable

7. You are never completely dressed until you put on a smile

C. Visiting on the job

1. Personal telephone calls should be kept at a minimum

2. Friends and relatives must understand that they should not call or have lengthy personal visits during working hours

D. Missing work

1. Have good attendance at both school and work for good references

   (NOTE: Some employment agencies report that many companies will not hire anyone who is absent as much as once a month regardless of the reason.)

2. Tell the teacher-coordinator if you are present at work or school but not both

3. Try not to miss work when you know there are a lot of tasks to be completed

4. Call the employer as early as possible when you must miss work due to illness

5. Do not miss work for school activities more than is absolutely necessary

INFORMATION SHEET

6. Always ask, not tell, the supervisor when you need time off from work

7. Ask off work as early as possible and then remind the supervisor again several days before taking the time off

8. Thank the supervisor for letting you take time off from work

9. Be willing to trade hours with co-workers who may want to be off at certain times

10. Be willing to come to work on short notice

E. Keeping busy

1. Never just stand around

    a. There are always things to be cleaned, straightened, stacked, marked, or displayed

    b. Every job, regardless of how dirty or unattractive, is important

    c. Use slack periods to memorize prices and stock locations

2. Never sit down on a job that can be done better standing up

3. Do not have to be told to do things

4. Work even when the supervisor is not around

    (NOTE: A recent survey shows that 66 percent of the students in cooperative training programs need improvement in this area.)

5. Stay with a task until it is finished

    (NOTE: Do not give up when it becomes difficult.)

6. Do not become upset if you must do a job over

F. Poise

1. Stay calm; work quickly and steadily without getting flustered when things go wrong or work piles up

2. Speak in a clear, distinct, refined voice; avoid slang, cursing, and improper English

INFORMATION SHEET

3. Avoid giggling, a loud voice, or distracting nervous gestures or habits

4. Do not talk about personal problems or complain about being tired or not feeling well

G. Personal management

1. Never ask for advance pay

2. Budget your money

3. Pay bills promptly

X. Quitting a job

A. Always give as much notice as possible

1. Both new and old employers will respect the emloyee who will give adequate notice before leaving

2. Two weeks notice or the length of one pay period is the customary courtesy

B. Get the teacher-coordinator's approval before quitting or changing jobs

(NOTE: Talking to the teacher-coordinator early may save a job or bring about needed changes on a job.)

C. Never walk off a job no matter how mad you get

D. Leave respectably in order to have good recommendations when applying for future jobs

E. Realize that everything will not be perfect on any job

F. Wait at least a month before becoming so dissatisfied with a job that you start thinking about or looking for another job

G. Realize that there is always some kind of experience, such as a new skill or something about human nature, that can be learned from every job

H. Plan on working over school breaks and at least until the end of the school year when a new DE student may take your place

I. Remember that it is easier to get a job when a person already has one

1. Do not leave one job until you have another

2. Employers will more likely feel a person is looking for opportunity rather than just a paycheck

3. Applicant will have an immediate reference to his/her ability to do well on a job

INFORMATION SHEET

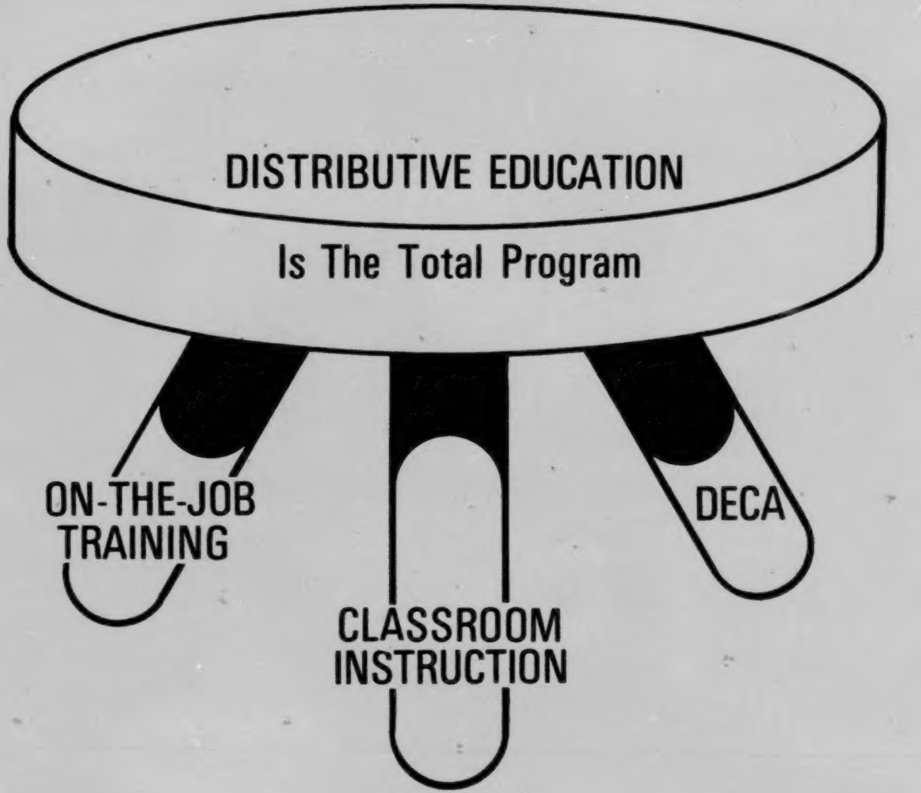
XI. Study habits

- A. Set aside a time to study when you are not tired
- B. Have good nonglaring light
- C. Have a relatively quiet atmosphere
- D. Realize that thirty minutes of concentrated study is more valuable than a longer time with several interruptions
- E. Outline and underline important points
- F. Notice headings of topics, units, sections, and paragraphs to help you organize and group your thoughts
- G. Realize that a review of what was studied well beforehand is usually all that is needed to pass a test

  (NOTE: Most forgetting takes place within the first 30 minutes after studying.)

Distributive Education: A Three-Legged Stool

Each Leg Is Needed To Make It Stand



DISTRIBUTIVE EDUCATION

Is The Total Program

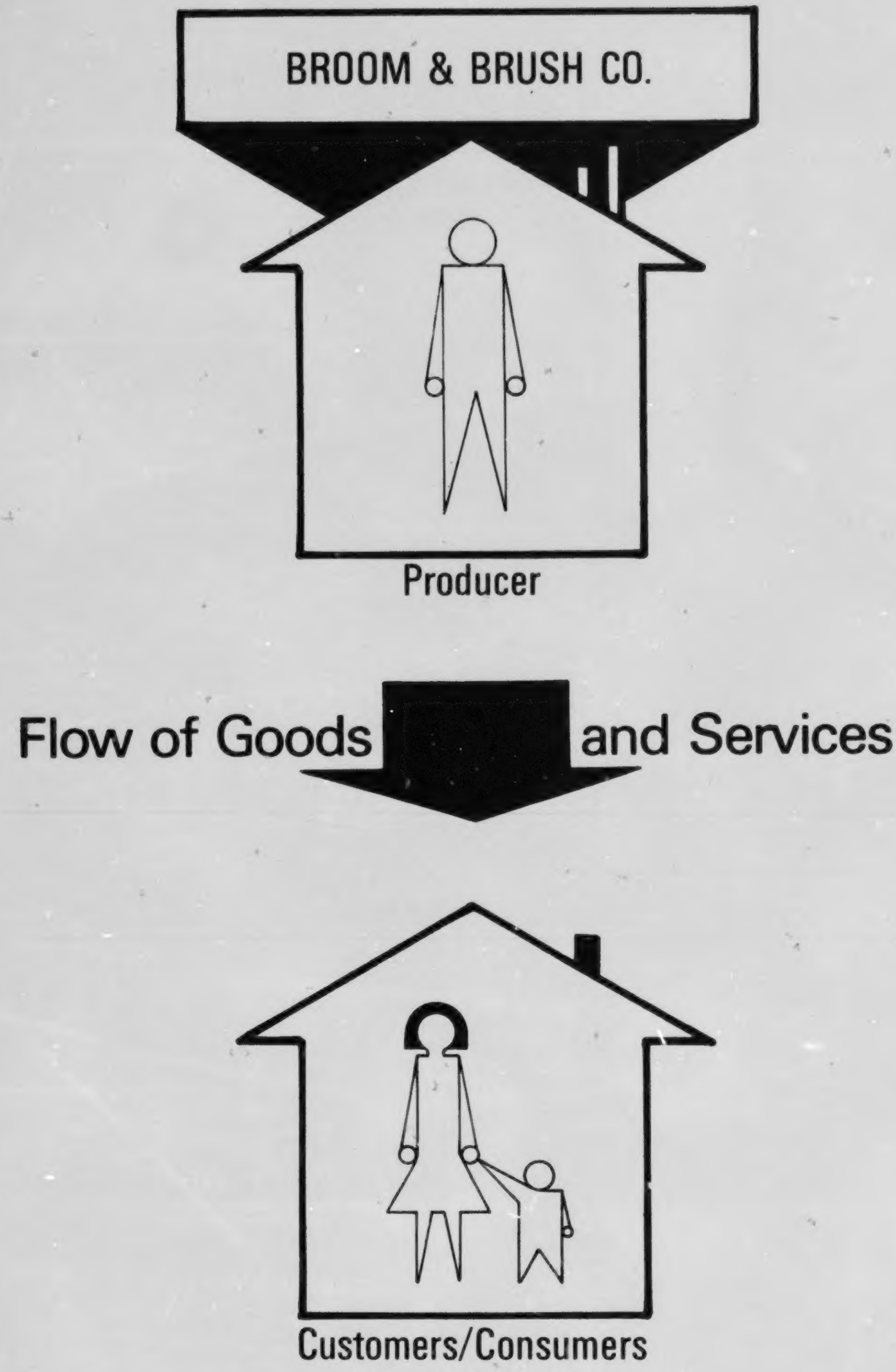
ON-THE-JOB TRAINING

CLASSROOM INSTRUCTION

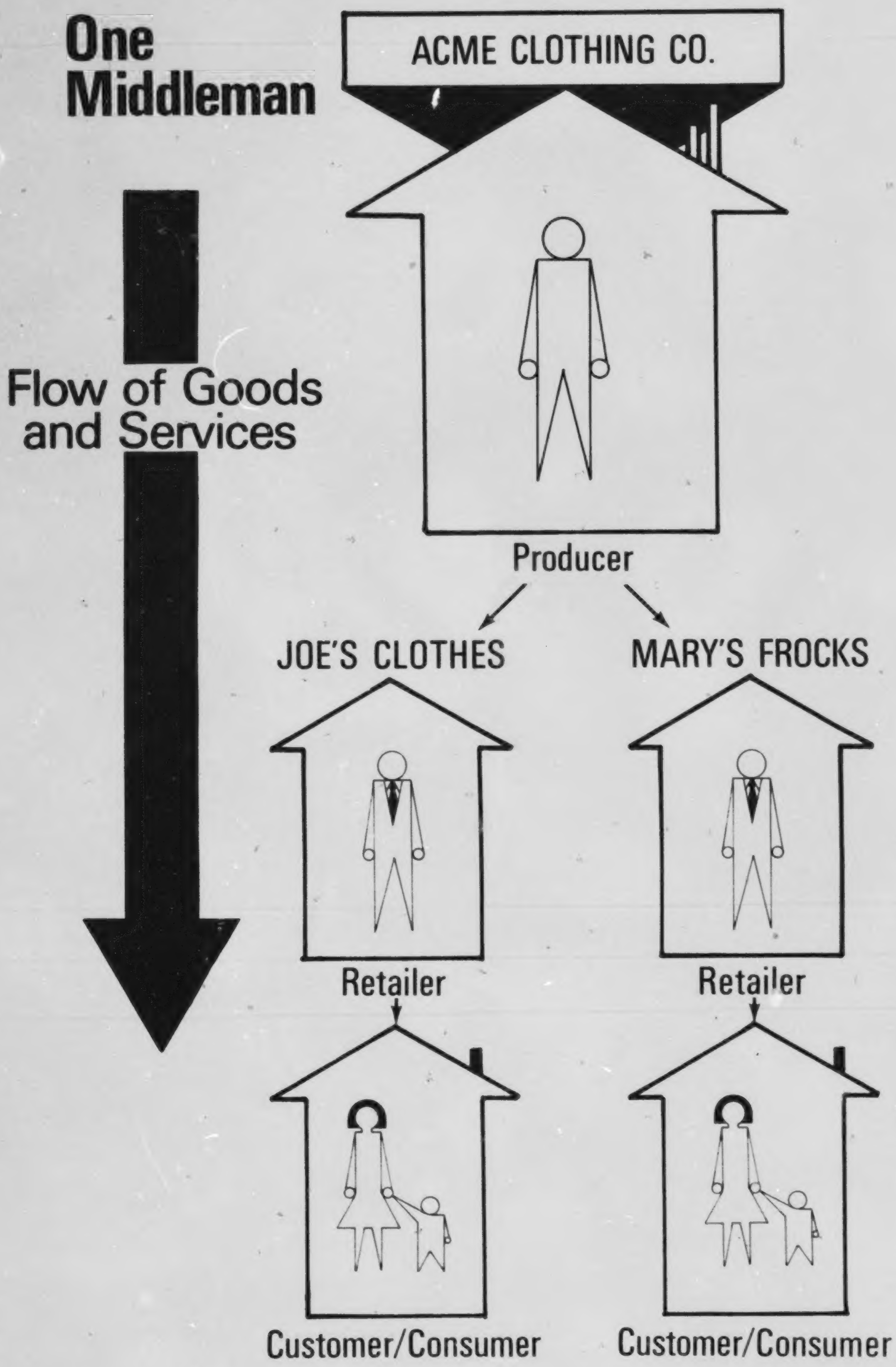
DECA

DO NOT FILM THIS PAGE

Direct Distribution


BROOM & BRUSH CO.
Producer
Flow of Goods and Services
Customers/Consumers

One Middleman



Flow of Goods and Services

ACME CLOTHING CO.

Producer

JOE'S CLOTHES

MARY'S FROCKS

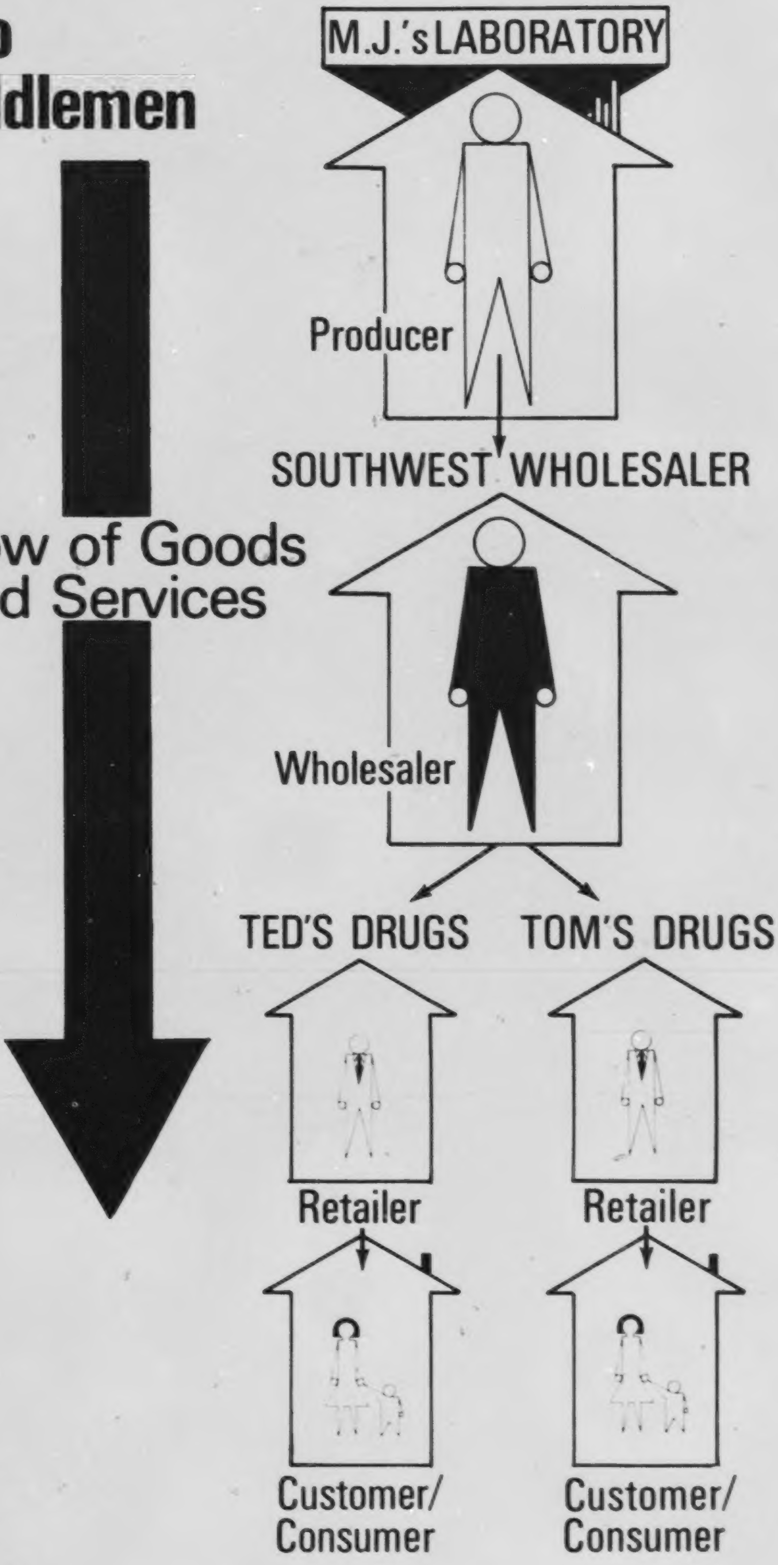
Retailer

Retailer

Customer/Consumer

Customer/Consumer

Two Middlemen



Flow of Goods and Services

M.J.'s LABORATORY

Producer

SOUTHWEST WHOLESALER

Wholesaler

TED'S DRUGS

TOM'S DRUGS

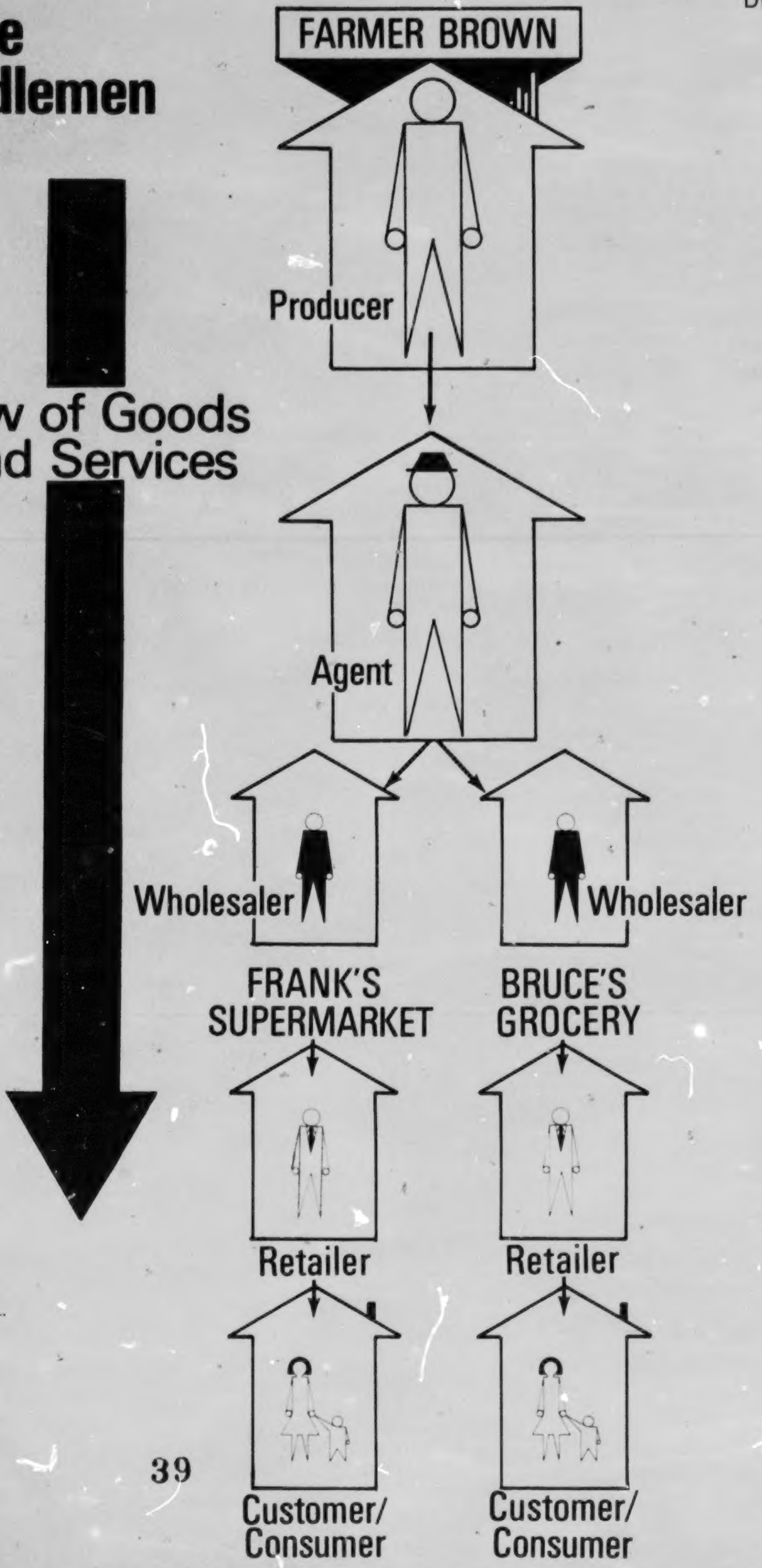
Retailer

Retailer

Customer/
Consumer

Customer/
Consumer

Three Middlemen



FARMER BROWN

Producer

Agent

Flow of Goods and Services

Wholesaler

Wholesaler

FRANK'S SUPERMARKET

BRUCE'S GROCERY

Retailer

Retailer

Customer/Consumer

Customer/Consumer

INTRODUCTION TO DISTRIBUTIVE OCCUPATIONS
UNIT I

ASSIGNMENT SHEET #1--DISCUSS WORK RULES

Read each of the following case study problems and decide which work rules have been violated, which rules have been kept, and how the problems could have been solved or avoided.

This assignment may be done by an individual or by small groups. The individual or a group leader should lead the class discussion on possible solutions. Share with the class any personal experiences or observations of broken work rules that have caused problems on a job.

(NOTE: The case studies can also be used for role playing a discussion between a supervisor and student-trainee.)

1. Roger Fads works at a lumber yard where he sells and does the stock work for building and home improvement supplies. Because he often must do heavy, dirty work it is not necessary for him to wear dress clothes. Therefore, he usually wears his old jeans with the knees worn out and one of his t-shirts with the picture of a marijuana leaf or a wine bottle. What work rules apply in this situation?

2. Bertha Breaks works in a small jewelry store with only one other employee. As soon as Bertha arrives at work the other employee can go on a break and then do some bookkeeping duties which cannot be done until someone comes to help the customers.

   However, because Bertha has such little time between school and work she asked if she could also have a break. Also, Bertha's mother now calls frequently to give her a short shopping list to fill during her break, and Bertha sometimes calls her mother to ask about borrowing the family car after work. What work rules are involved in this situation?

3. Lawanda Late works at a flower and gift shop. She is an excellent employee except for one problem. Lawanda has difficulty getting to work on time on Saturday mornings after a late date on Friday nights. She just didn't hear her alarm go off several times and she has also left work early several afternoons. After her DE teacher-coordinator talked to her training station sponsor, what work rules do you suppose the DE teacher-coordinator discussed with Lawanda?

4. Susan Shy is a timid girl who works in the ladies ready-to-wear department of a well-known chain of department stores. She is very good about assuming new responsibilities. For example, after she quickly finished marking a shipment of blouses she asked the department head to show her how to operate the ticket printing machine and how to figure the cost code. However, when it became time to display the blouses several of the plastic bags protecting the blouses were so badly wrinkled that they looked like old merchandise. Consequently, several of these blouses had to later be marked down in order to sell. What work rules are involved in this situation?

ASSIGNMENT SHEET #1

5. Martha Messy works in an exclusive women's boutique. The owner of the shop became outraged when Martha carelessly mixed shoe sizes when placing the shoes back in their boxes. Martha also returned a box of scarves to the wrong shelf and left a box of pantyhose laying on the counter. "I told you several times to handle the merchandise more carefully," the owner said sharply. Martha didn't know how to react. What work rules are involved in this situation?

6. Stanley Stand just got fired. His explanation is the following: "The boss seemed to have a good reason for cutting back on the number of employees at this time, but I think he really just doesn't like me. The boss mentioned once that I didn't seem interested in the job. Heck, I'm going to be a lawyer. I just want to work in a men's clothing store to get through eight years of college. I don't need to know how to do all that stuff in the store. Besides, the boss always got mad if I just stood around a minute. He and the older employees are always standing around talking to each other when there are not customers in the store. They expected me to do my work and their work too, especially if it was dirty work." Stanley does not seem to be aware of which work rules?

7. Cynthia Sit is a waitress at Delicious Steak Place. Toward the end of the day Cynthia is very tired, so she sits down in the booths while cleaning off the tables. She figures that she deserves a rest considering the low wages she is paid. What work rules are involved in this situation?

8. Peggy Pretty works in a fabric shop. Her employer had second thoughts about hiring Peggy because Peggy began to wear a lot more make-up. She also began to wear short dresses or low cut pants which were not practical for lifting and stooping. Peggy sometimes wore jeans to school but changed clothes when she got to work, which took about ten minutes of her work time.

   Peggy had also been observed using the store's postage stamps for personal letters and giving discounts to her friends. The employer ended up firing Peggy. Was the employer justified in letting Peggy go? Will Peggy fully understand why she was dismissed without an understanding of all the work rules?

INTRODUCTION TO DISTRIBUTIVE OCCUPATIONS
UNIT I

ASSIGNMENT SHEET #2--FORMULATE AN OCCUPATIONAL OBJECTIVE

On the following pages is a list of some of the many opportunities in the fields of marketing and distribution. These occupations may be found in the various departments of large stores, in small independent businesses and boutiques, and in chain stores and franchises.

1. Select three occupations you are interested in exploring. You may select all three occupations from one category or you may mix your choices among two or three categories.

2. Interview at least two people from each of the occupations selected.

   (NOTE: Questions for resource people in the front of the book may be used as a guide.)

3. Repeat this selection and interview process until you are able to narrow your choice of an occupational objective to one occupation. Your decisions should be based upon a knowledge and understanding of several career areas.

   (NOTE: It may be necessary to repeat this assignment throughout the year.)

4. Relate the classroom topics, individual studies, and on-the-job training to your occupational objective.

5. Complete the questions following the occupational checklist. These should help you when planning your individual studies.

Advertising Services

Sales and/or management personnel involved in planning, developing, placing, and evaluating tasks for creating demand and promoting sales. These sales promotion activities use displays, merchandising aids, and mass media. Such occupations are found in advertising agencies, display houses, retail and wholesale establishments, and production industries.

_____ Direct mail specialist

_____ Radio/television time salesperson

_____ Commercial announcement writer

_____ Newspaper/magazine layout artist

_____ Newspaper/magazine copy writer

_____ Newspaper space salesperson

ASSIGNMENT SHEET #2

_____ Public relations person

_____ Advertising department head

_____ Marketing research director

Positions with:

_____ Advertising agency

_____ Sign company (including plastic car signs and neon signs)

_____ Billboard advertising agency

_____ Catalog company

Apparel and Accessories

Management and/or sales personnel at all levels in the distribution channels, including wholesalers, department managers, buyers, and store owners/managers. Apparel and accessories occupations deal with numerous products and combinations of products.

_____ Women's clothing

_____ Children's clothing

_____ Maternity wear

_____ Shoes

_____ Jewelry

_____ Formal wear rental

_____ Uniforms (sales and rental)

_____ Optical products

_____ Bridal fashions

_____ Orthopedic shoes

_____ Furs (sales and storage)

_____ Wigs

_____ Fashion model

ASSIGNMENT SHEET #2

Automotive

Management and/or sales personnel in retail, wholesale, and service establishments involved with the selling, renting, storing, or caring of cars and trucks and in selling automotive parts, accessories, and equipment.

_____ Car wash owner/manager

_____ Mobile home salesperson

_____ Camper salesperson

_____ Car rental manager

_____ New car dealer

_____ Used car lot salesperson/owner-manager

_____ Auto parts and accessories salesperson, department manager, store owner-manager, or wholesaler

Finance and Credit

Occupations found in banks, savings and loan associations, loan companies, credit departments, finance departments, credit unions, stock brokerages.

_____ Securities traders

_____ Reserve officer

_____ New accounts teller

_____ Bank cashier

_____ Credit union supervisor

_____ Investment and tax counseling service

_____ Grain broker

Floristry

Sales and sales-supporting tasks performed by employees and management personnel in retail and wholesale establishments engaged in selling cut flowers, growing plants, artificial plants, and related items for ornamental use.

_____ Floral designer

_____ Florist supplies salesperson

ASSIGNMENT SHEET #2

_____ Flower shipping clerk

_____ Flower shop owner/manager

Food Distribution

Sales and sales-supporting tasks performed by employees and management in establishments primarily engaged in selling food for home preparation or selling agricultural and livestock products at wholesale.

_____ Livestock commission person

_____ Agricultural products commission person

_____ Bakery products salesperson

_____ Route supervisor

_____ Supermarket managers

_____ Supermarket department head (produce and meats)

_____ Bagger

_____ Fruit stand operator

_____ Candy shop manager

_____ Health foods store owner/manager

_____ Vending machine route operator

_____ Feed store manager

_____ Feed mill manager

_____ Food broker

_____ Soft drink route salesperson

_____ Cashier

Food Service

Sales and sales-supporting tasks performed by employees and management personnel in establishments serving prepared food and drinks which are usually consumed on the business premises. Establishments may be privately owned or franchised.

_____ Doughnut shop manager

_____ Caterer

_____ Waiter/waitress

ASSIGNMENT SHEET #2

Persons involved in management and service in:

_____ Restaurant

_____ Cafeteria

_____ Drive-in

_____ Fast food establishment

_____ Club

General Merchandise

Sales and sales-supporting tasks performed by employees and management personnel engaged primarily in selling various types of merchandise at all levels in the distribution channel. Retail outlets include department stores, variety stores, discount stores, and catalog houses.

_____ Department store clerk

_____ Department store salesperson

_____ Department head

_____ Department store manager

_____ Department store buyer

_____ Drug store manager

_____ Greeting card/gift shop owner/manager

_____ Cosmetics salesperson (door-to-door and cosmetic department)

_____ Auctioneer

_____ Pet store owner/manager

_____ Fabrics department head/store owner

_____ Household goods salesperson

Hardware, Building Materials, Farm and Garden Supplies and Equipment

Sales and sales supporting tasks performed by employees and management personnel in establishments engaged primarily in selling one or more of the following product lines at retail, at wholesale, or to contractors: hardware, paint, wallpaper, lumber, building materials, supplies and equipment for home construction, or farm and garden supplies and equipment.

_____ Tractor and implement salesperson

_____ Cattle and poultry food supplement salesperson

ASSIGNMENT SHEET #2

_____ Lawn and garden supply store owner/manager

_____ Lawn supplies department head

_____ Construction equipment and supplies salesperson

Home Furnishings

Sales and sales-supporting tasks performed by employees and management personnel in retail and wholesale establishments engaged primarily in selling home furnishings such as furniture, household appliances, floor coverings, draperies, and specialized lines of home items.

_____ Second-hand furniture dealer

_____ Custom drapery salesperson

_____ Music store owner/manager

_____ Appliance dealer

_____ Furniture store owner/manager

_____ Antique dealer

_____ Sewing machine department head/store manager

_____ Carpet store owner/manager

Hotel and Lodging

Tasks performed by employees and management personnel in establishments providing lodging, meals, and convention facilities and services on a year-round or seasonal basis to the general public or to an organization's membership.

_____ Convention manager

_____ Desk clerk

_____ Hotel/motel manager

_____ Resort/lodge manager

Industrial Marketing

Tasks performed by sales and management personnel in establishing market potentials and selling goods and services to business and institutional buyers for use in their operations.

_____ Church furniture and equipment sales representative

_____ School equipment and supplies salesperson

ASSIGNMENT SHEET #2

_____ Office machines salesperson

_____ Engineering supplies representative

_____ Veterinarian supplies salesperson

_____ Paper products salesperson

_____ Plastics salesperson

_____ Dental and medical supplies salesperson

_____ Barber and beauty shop supplies salesperson

_____ Plumbing supplies store owner/manager

Insurance

Sales and management personnel involved in the insurance industry.

_____ Insurance examiner

_____ Estate planner

_____ Underwriter

_____ Hospital-insurance representative

_____ Claims adjuster

_____ Insurance salesperson

_____ Insurance office manager

Personal Services

Sales and management personnel for establishments providing services.

_____ Delivery service

_____ Funeral director

_____ Photograph studio manager

_____ Dry cleaners manager

_____ Shoe repair shop manager

ASSIGNMENT SHEET #2

Petroleum

Sales and sales-supporting tasks performed by employees and management personnel in retail and wholesale establishments engaged in the distribution of petroleum products.

_____ Propane dealer

_____ Service station attendant

_____ Service station manager

Real Estate

Tasks performed by persons who act for themselves or as agents for firms engaged in buying, selling, appraising, renting, managing, and leasing of real property.

_____ Apartment manager

_____ Real estate salesperson

Recreation and Tourism

Sales, counseling, and sales-supporting tasks performed by employees and management personnel in establishments primarily engaged in amusement, recreation, entertainment, recreational supplies and equipment, travel services, and businesses which stimulate the local economy through tourism.

_____ Booking agent

_____ Country club manager

_____ Pro-shop manager

_____ Boat shop manager

_____ Cycle shop manager

_____ Snowmobile salesperson

_____ Theatre manager

_____ Camera store manager

_____ Sporting goods salesperson

_____ Bowling lane counterperson

_____ Bookstore manager

_____ Hobby shop manager

_____ Skating rink manager

_____ Swimming pool salesperson

ASSIGNMENT SHEET #2

Transportation

Sales, storing, and sales-supporting tasks performed by employees and management personnel in enterprises engaged in passenger and freight transportation, public warehousing, and services incidental to the transportation of people, personal effects, and products.

_____ Toll collector

_____ Aircraft salesperson

_____ Bus hostess

_____ Airline stewardess

_____ Bus/cab company manager

_____ Travel agent

_____ Car rental agent

Other Retail, Wholesale, Distributive, or International Trades

_____ Importer

_____ DE teacher-coordinator

_____ Pest control service sales personnel

_____ Public utilities sales personnel (heat, power, lights, telephone, telegraph)

_____ Chamber of Commerce manager

_____ Display manager

_____ Store location specialist

_____ Market research analyst

_____ Water softener sales personnel

_____ Warehouse manager

_____ Organization fund-raiser (Colleges, hospitals, DECA, heart fund)

Complete the following questions:

1. My occupational objective(s) is (are) . . .

2. List the companies related to your occupational objective to which you can write for information about their products, industry, and career opportunities.

ASSIGNMENT SHEET #2

3. List the textbooks, magazines, trade journals, and individual study materials related to your occupational objective.

4. What businesses can you visit individually or on a class field trip to learn more about your choice of an occupation?

5. What other people could you talk to or invite to speak to the class or a DECA chapter meeting about your occupational objective?

6. List some goals which you plan to accomplish on the job during this grading period. Discuss the goals with your DE teacher-coordinator and training station sponsor. At the end of each grading period make any necessary adjustments and set your learning goals for the next grading period.

INTRODUCTION TO DISTRIBUTIVE OCCUPATIONS
UNIT I

ANSWERS TO ASSIGNMENT SHEET #1

1. Although it is not necessary to always wear a uniform or dress clothes, it is important to look as neat as possible and to avoid fads or controversial apparel.

2. A new employee may give the wrong impression if he/she asks for a break during the first few weeks of employment. If a break is required or offered by the company, then it would be fine to go and return from break on time. Personal errands that would cause a person to not return from his/her break on time should be done on the employee's own time. Personal telephone calls should also be avoided.

3. Getting to the job on time and putting in a full day's work are very important. A few minutes taken off the beginning and/or end of each work day may not seem like much, but they soon add up to several hours of pay without working. A student should also have good health and rest rules so he/she may feel and look alert on the job.

4. It is very good to stay busy on the job and to ask the supervisor for new and more difficult responsibilities when assigned duties are completed. However, all jobs are important and should be done well. Merchandise and supplies are an investment in the business and should be handled carefully. No one likes to purchase soiled, wrinkled, or damaged merchandise at the regular price.

5. All jobs, no matter how small or dirty, are important to a business that is efficiently run. An employee should not have to be constantly reminded that there are jobs to be done.

   When facing criticism, it is best for a person to look at the supervisor without getting angry, making excuses, looking hurt, crying, pouting, or sulking.

6. New or young employees may not always have the same rights or privileges as older, trusted employees with seniority. Sometimes new employees cannot fully understand the importance of discussions and activities which on the surface do not seem important. It is also true that part-time employees are often hired so they can handle routine duties and thus relieve full-time employees to do other tasks.

   It is important to show interest in a job. Many part-time jobs open up new areas of interest and opportunity, become valuable for future references, or develop into profitable sideline activities.

   A student that loses his/her job should not look for excuses or shift the blame without just cause. However, a student should learn and improve from every experience.

7. It is not proper to sit down on a job. Few jobs can be done as well while sitting down, and it does not look good to customers who enter the business to find employees sitting down on the job.

Starting wages may not be high in some fields, but a young employee must look ahead to future opportunities. A person who sells on a commission or who receives tips or bonuses is able to start at or above the average starting salaries.

8. Heavy make-up tends to make a young lady look immature, cheap, or fake. Light, natural make-up and a clear, clean complexion are preferable. Fashionable conservative clothes are more practical and less distracting for most types of jobs.

Preparation for work should be done on the student-trainee's own time.

it is dishonest to use business supplies for personal use or to give special discounts and favors to friends and relatives without the supervisor's approval.

Being attentive to the customers' needs builds sales and good will. It also prevents shoplifting which cuts into store profits.

INTRODUCTION TO DISTRIBUTIVE OCCUPATIONS
UNIT I

TEST

1. Match the terms on the right to the correct definitions by placing the appropri numbers in the blanks provided.

_____a. Courses which specifically help a person prepare for a career

_____b. All the activities involved in getting goods and services from the producers to the consumers

_____c. Channels through which goods and services get from the producers to the consumers

_____d. Vocational course in marketing and distribution consisting of on-the-job training, classroom instruction, and DECA activities

_____e. Goal for a possible future career

_____f. Form used in DE to keep a record of hours worked, wages received, and duties performed on the job

_____g. Person who finally uses a product or service; often the same person as the customer or the one who makes the purchases

_____h. Business which cooperates with the school to provide training and learning experiences for students enrolled in cooperative vocational education programs

_____i. Instructional program where students receive school credit for on-the-job training as opposed to project classes which provide training mostly throug[illegible] classroom projects

_____j. Employer or supervisor responsible for training and evaluating students enrolled in cooperative vocational education programs

_____k. General classroom instruction needed by everyone in marketing and distribution

_____l. Instruction directly related to the student's occupational objective and on-the-job training

1. Distributive education
2. Vocational education
3. Marketing
4. Distribution system
5. Occupational objective
6. Consumer
7. Cooperative vocational education program
8. Group instruction
9. Job record sheet
10. Individual instruction
11. Training station
12. Training station sponsor

2. List five advantages of DE to the student.

   a.

   b.

   c.

   d.

   e.

3. List three adjustments which a student must make upon enrolling in the DE program.

   a.

   b.

   c.

4. Select from the list below the things which a new employee should do the first week on the job. Place an "X" in the correct blanks.

   ______a. Begin on a first-name basis

   ______b. Ask about lunch breaks

   ______c. Ask about coffee breaks

   ______d. Ask questions if instructions, store policies, and salary information are not clear

   ______e. Repeat instructions to a person relaying information to make sure the information was understood correctly

   ______f. Ask "Did I answer your questions?" when giving information to other people

   ______g. Write down information that is hard to remember

5. Select from the list below ways a student can get along with the supervisor. Place an "X" in the correct blanks.

   ______a. Do things to show the supervisor a DE student/trainee is dependable

   ______b. Do not assume new or more difficult responsibilities when your assigned duties are completed

   ______c. Do not appear to flirt with anyone while on the job

   ______d. Handle merchandise and supplies respectfully ______e. Show the supervisor that "there is nothing to it" when learning about the business

______f. Impress the supervisor with your easier and better way of doing things

______g. Learn from all supervisors, both the good ones and those less skilled

6. Select from the list below ways a student can get along with co-workers. Place an "X" in the correct blanks.

______a. Know all co-workers by name

______b. Greet by name or at least smile at the other employees upon arriving to work

______c. Wait to be introduced to co-workers by the supervisor or another employee

______d. Listen, ask questions, and thank the other employees who try to help a new employee

7. Select from the list below ways a student can get along with customers. Place an "X" in the correct blanks.

______a. Overcome shyness

______b. Smile and greet each customer with whom you come in contact

______c. Try to remember customers' names, likes, and dislikes

______d. Help each customer with his/her individual buying problem

______e. Remember that customers are just an interruption of your work

______f. Realize that there will be some difficult customers

______g. Ignore customers that are "just looking"

______h. Argue with a customer to convince him/her that you have correct product information

8. Discuss the characteristics of a good employee.

a. Cooperation

b. Initiative

c. Honesty

d. Willingness to learn

e. Following directions

f. Dependability

g. Enthusiasm

h. Accepting criticism

i. Loyalty

j. Sense of humor

k. Positive attitude

9. State two work rules under each of the following categories.

a. Punctuality

1)

2)

b. Neat appearance and appropriate clothes for the job

1)

2)

c. Visiting on the job

1)

2)

d. Missing work

1)

2)

e. Keeping busy

1)

2)

f. Poise

1)

2)

g. Personal management

1)

2)

10. Select from the list below those conditions which a student should meet before quitting a job. Place an "X" in the correct blanks.

_____a. Always give as much notice as possible

_____b. Two days notice is customary

_____c. Tell the teacher-coordinator after you have quit or changed jobs

_____d. Never walk off a job no matter how mad you get

_____e. Tell the boss off whenever you feel like it for it will not hurt recommendations for future jobs

_____f. Make a decision about liking or not liking a job during the first two weeks of employment ______g. Realize that there is always some kind of experience, such as a new skill or something about human nature, that can be learned from every job

______h. Take off over school breaks and quit early for activities at the end of the school year

______i. Remember that it is easier to get a job when a person already has one

11. Select good study habits from the list below by placing an "X" in the correct blanks.

______a. Study just before going to bed

______b. Have good nonglaring light

______c. Watch TV while studying

______d. Cram before a test

12. Discuss work rules related to various situations.

13. Formulate an occupational objective.

(NOTE: If activities 12 and 13 have not been accomplished prior to the test, ask your teacher-coordinator when they should be completed.)

INTRODUCTION TO DISTRIBUTIVE OCCUPATIONS
UNIT I

ANSWERS TO TEST

1.
   a. 2
   b. 3
   c. 4
   d. 1
   e. 5
   f. 9
   g. 6
   h. 11
   i. 7
   j. 12
   k. 8
   l. 10

2. Any five of the following:
   a. Receives one to three hours credit--Credit is based upon classroom instruction, on-the-job training, and DECA activities
   b. Graduates ready to enter the field of marketing on a full-time or part-time basis and/or to continue his/her business education in college, company training programs, or specialized school
   c. Gains good references for future jobs
   d. Earns money while learning
   e. Receives satisfaction in helping other people
   f. Learns to accept supervision and to work with other people
   g. Advances faster on a job than workers without training
   h. Finds much is expected of him/her from teachers, parents, supervisors, and co-workers
   i. Develops leadership through DECA activities
   j. Relates classroom instruction and experiences on the job
   k. Becomes aware of the exciting opportunities in the field of marketing
   l. Learns what he/she wants and does not want in selecting a career
   m. Has the opportunity to experience success
   n. Shares the prestige of being accepted in a training program with high standards, reputation, and support from major companies
   o. Often receives discounts on store merchandise

p. Can apply general business principles to several areas of his/her personal life

q. Receives guidance on problems before the problems become major areas of concern

3. Any three of the following:

a. Must limit participation in some school and social activities

b. Works over holidays, at nights, and on weekends

c. Provides own transportation to work

d. Accepts wages that may not be as high as starting salaries in other fields

e. Budgets his/her time in order to have time to study other subjects

f. Adjusts class schedule

g. May sometimes have to begin training in an indirectly related job because of limitations due to licensing, age, training, and time

4. b, d, e, f, g

5. a, c, d, g

6. a, b, d

7. a, b, c, d, f

8. Discussion should include:

a. Cooperation--Helping other employees if permissible when your duties are completed

b. Initiative--Moving to additional duties which require more responsibility and more difficult skills

c. Honesty

1) Starting work on time

2) Returning from breaks and lunch on time

3) Being productive while at work

4) Not leaving work a few minutes early

5) Not taking stamps, pens, paper, and tools for personal use

6) Not stealing money and/or merchandise

   7) Not giving special favors and discounts to friends and relatives without the supervisor's approval

   8) Preventing friends from shoplifting from the business

d. Willingness to learn--Approaching a class and job with an open mind will make the tasks more interesting

e. Following directions--Listening and reading instructions will save time and effort

f. Dependability--Completing a task on schedule is a sign of maturity and responsibility

g. Enthusiasm--Acting excited and eager about your job will often cause everyone to get more work done quickly and easily

h. Accepting criticism

   1) It is impossible to do everything correctly all the time

   2) Occasionally everyone must accept criticism

   3) Do not make excuses

   4) Look the supervisor in the face and try not to look hurt, sulky, or mad

i. Loyalty

   1) Keep confidential matters such as price margins and cost codes to yourself

   2) Do not participate in gossip and disputes

   3) Do not criticize the business to outsiders

   4) Buy merchandise from your place of business when needed

j. Sense of humor--Person who can laugh when the joke is on himself/herself will gain the acceptance of co-workers

k. Positive attitude--Looking for what is good and right about something or someone and not always complaining or focusing on what is unpleasant

   1) Create and keep positive attitude

   2) Keep comments positive--Avoid complaining and using words such as "can't," "won't," and "don't"

   3) Look for good things in people, your department, and/or company

4) Show that you care about your job and future career

5) Act happy and enthusiastic and you will be happy and enthusiastic

6) Do not permit co-workers or supervisors who have negative attitudes to trap you into their way of thinking

7) Do not let home problems and romance problems influence your work

9. Any two of the following under each category:

a. Punctuality

1) Arrive five minutes early

2) Dress, gather tools, pencils, and salesbooks on your own time

3) Return from breaks on time

4) Run personal errands on own time

5) Do not be a clock watcher

6) Be willing to work a few minutes overtime without pay unless company policy or the use of a time clock prohibits such action

7) Never rush or walk away from a customer because of break or dismissal time

b. Neat appearance and appropriate clothes for the job

1) Clean hands and nails are important

2) Dangling jewelry may be distracting and bothersome

3) Clothing fads, jeans, or t-shirts may not be appropriate

4) Precaution should be taken against body and breath odor

5) Clean, styled hair is helpful in getting and keeping most good jobs

6) As little make-up as possible is more appropriate for work

   a) Natural shades are better for work

   b) Heavy eye make-up is seldom appropriate for work

   c) Clear complexion is desirable

7) You are never completely dressed until you put on a smile

c. Visiting on the job

1) Personal telephone calls should be kept at a minimum

2) Friends and relatives must understand that they should not call or have lengthy personal visits during working hours

d. Missing work

1) Have good attendance at both school and work for good references

2) Tell the teacher-coordinator if you are present at work or school but not both

3) Try not to miss work when you know that there are a lot of tasks to be completed

4) Call the employer as early as possible when you miss work due to illness

5) Do not miss work for school activities more than is absolutely necessary

6) Always ask, not tell, the supervisor when you need time off from work

7) Ask off work as early as possible and then remind the supervisor again several days before taking the time off

8) Thank the supervisor for letting you take time off from work

9) Be willing to trade hours with co-workers who may want to be off at certain times

10) Be willing to come to work on short notice

e. Keeping busy

1) Never just stand around

    a) There are always things to be cleaned, straightened, stacked, marked, or displayed

    b) Every job, regardless of how dirty or unattractive, is important

    c) Use slack periods to memorize prices and stock locations

2) Never sit down on a job that can be done better standing up

   3) Do not have to be told to do things
   4) Work even when the supervisor is not around
   5) Stay with a task until it is finished
   6) Do not become upset if you must do a job over

f. Poise
   1) Stay calm; work quickly and steadily without getting flustered when things go wrong or work piles up
   2) Speak in a clear, distinct, refined voice; avoid slang, cursing, and improper English
   3) Avoid giggling, a loud voice, or distracting nervous gestures or habits
   4) Do not talk about personal problems or complain about being tired or not feeling well

g. Personal management
   1) Never ask for advance pay
   2) Budget your money
   3) Pay bills promptly

10. a, d, g, i

11. b

12. Evaluated to the satisfaction of the teacher-coordinator

13. Evaluated to the satisfaction of the teacher-coordinator

DECA
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to discuss the origin and organization of DECA at the local, state, and national levels. The student should also be able to list the DECA colors and the meaning of each, describe the requirements for official dress, and identify the parts of the DECA emblem. He/she should be able to select from a list DECA competitive activities and discuss chapter awards. This knowledge will be evidenced by an overall score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with DECA to the correct definitions.
2. Write a short paragraph about the origin and development of DECA.
3. Discuss the divisions of DECA.
4. List the colors of DECA and the meaning of each.
5. Identify the parts of the DECA emblem.
6. State the meaning of each part of the DECA emblem.
7. Recite the DECA creed.
8. State the DECA tagline.
9. Describe the official dress of DECA members and the appropriate way to wear the uniform and jewelry.
10. Discuss the chapter offices and their duties.
11. Name the present state officer action team.
12. Name the present national officer action team.
13. Name two DECA publications.
14. Select from a list those DECA conferences which students may be able to attend.

15. Select from a list those DECA competitive activities which students may enter.

16. Discuss chapter awards.

17. Discuss DECA scholarships for which students may apply.

18. Select from a list the other vocational student organizations in Oklahoma.

19. List the order of business.

20. Select from a list those things that make a good DECA chapter meeting.

21. List characteristics of a good chairperson.

22. Describe the action called for when the chairperson raps the gavel once, twice, or three times.

23. Describe the proper way to introduce a motion.

24. Match common motions to the correct definitions.

25. Describe the procedure for introducing guest speakers.

DECA
UNIT II

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

   A. Provide student with objective sheet.

   B. Give pretest using objective sheet.

   C. Provide student with information sheet.

   D. Make transparencies.

   E. Discuss unit and specific objectives.

   F. Discuss information sheet.

   G. Provide students with a copy of the *DECA Guide* for ordering blazers and pins.

   H. Provide copies of the *Oklahoma Association Handbook, National Handbook,* and *Activities and Awards Manual* to plan the chapter's program of work.

   I. Provide pictures of state and national officers so students may associate names and faces.

   (NOTE: Pictures may be found in the *DECA Distributor* and *Oklahoma DECA*.)

   J. Have students recite DECA creed individually before test.

   K. Give test.

   L. Reteach if necessary.

   M. Test again until minimum standard is reached.

II. Student:

   A. Read objective sheet.

   B. Study information sheet and take notes.

   C. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

A. Objective sheet

B. Information sheet

C. Transparency masters

1. TM 1--National DECA Organization Chart

2. TM 2--Oklahoma Association of DECA Organization Chart

D. Test

E. Answers to test

II. References:

A. *Oklahoma Association of Distributive Education Clubs of America Handbook.* Stillwater: Oklahoma Department of Vocational and Technical Education, Division of Distributive Education, 1974.

B. *Activities and Awards Program.* Stillwater: Oklahoma Department of Vocational and Technical Education, Division of Distributive Education, 1974.

C. *National DECA Handbook.* Seventh Edition. Falls Church, Virginia: Distributive Education Clubs of America, Inc., 1972.

III. Film: "DE: Tell It Like It Is." Available from Association Films, Inc.; 1621 Dragon Street; Dallas, Texas 75207.

DECA
UNIT II

INFORMATION SHEET

I. Terms and definitions (Transparencies 1 and 2)

A. DECA--Student organization for students enrolled in the distributive education program

(NOTE: DECA is a part of the DE division of the State Department of Vocational and Technical Education.)

B. State advisor--Person responsible for DECA activities in the state

C. Voting delegate--Person who represents the chapter or state association in handling business and electing officers during the state and national conferences

D. DECA, Inc.--Governing body of DECA made up of DE state supervisors from each state association

E. DECA, Inc., Board of Directors--Committee which sets policies for DECA and consists of fifteen members including a national DECA officer and a chapter advisor

F. National Advisory Board--Advisory committee for the board of directors made up of representatives from companies which contribute financial support to DECA

G. DECA Foundation--Organization established to provide funds for national scholarship-loan awards

H. Congressional Advisory Board (CAB)--Board made up of Congressmen who actively support DECA

II. Origin and development of DECA

A. Need for distributive education training was met by the passage of the George Deen Act in 1937

B. Student organizations to develop leadership and promote careers began to spring up under many different names

C. First statewide meeting in Oklahoma was held in Oklahoma City in 1942

D. First national conference held in 1946 in Memphis, Tennessee

E. Oklahoma is one of the seventeen charter state associations

F. Today there are fifty-two state associations, including ones in the District of Columbia and Puerto Rico

INFORMATION SHEET

III. Divisions of DECA (Transparency 1)

  A. High school--High school students enrolled in a distributive education program

  B. Junior collegiate--Students enrolled in middle management programs in junior and community colleges

  C. Collegiate--Students majoring in distributive education and/or alumni enrolled in a college or university with a DE teacher education program

  D. Alumni--Organization of graduates from the high school, junior collegiate, and/or collegiate divisions who wish to continue their interest in and support of DE and DECA

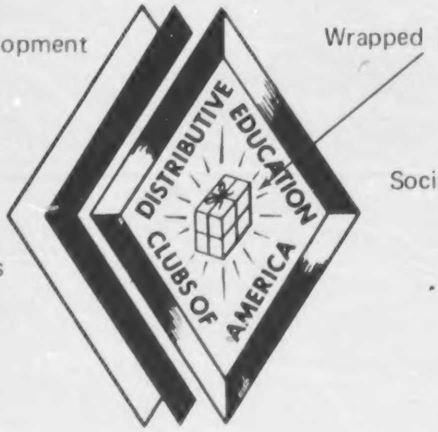
  E. Professional--Organization of teachers, business people, parents, and other interested people who support DE and DECA

IV. Colors of DECA

  A. Blue--Suggests sincerity and genuineness

  B. Gold--Suggests the crowning success which comes to one who lives usefully and wisely

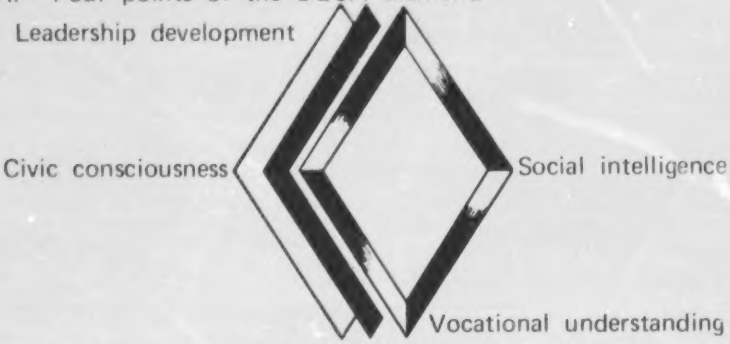
V. DECA emblem


Leadership development
Wrapped package and rays of sunshine
DISTRIBUTIVE EDUCATION CLUBS OF AMERICA
Social intelligence
Civic consciousness
Vocational understanding

INFORMATION SHEET

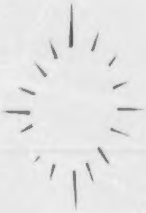
VI. Parts of the DECA emblem

A. Four points of the DECA diamond



1. Vocational understanding--Distributive education graduate is prepared to take his/her place in the business world
2. Civic consciousness--Each student recognizes his responsibility to his/her community
3. Social intelligence--DECA member has the opportunity to develop socially
4. Leadership development--DECA member has an opportunity to assume responsibility as a leader and follower

B. Wrapped package and rays of sunshine--Personal satisfaction from doing a job well



VII. DECA Creed

I believe in the future which I am planning for myself in the field of distribution and in the opportunities which my vocation offers.

I believe in fulfilling the highest measure of service to my vocation, my fellow beings, my country, and my God--that by so doing, I will be rewarded with personal satisfaction and material wealth.

INFORMATION SHEET

I believe in the democratic philosophies of private enterprise and competition and in the freedoms of this nation--that these philosophies allow for the fullest development of my individual abilities.

I believe that by doing my best to live according to these high principles, I will be of greater service both to myself and to mankind.

VIII DECA tagline--Developing future leaders in marketing and distribution

IX. Official dress of DECA members

A. DECA blazer

1. Consists of navy blue coat with DECA emblem on left breast pocket

2. Snould be worn proudly with appropriate clothing

3. Must not be worn if member is smoking

B. Membership pins

1. Consists of DECA emblem which may have officer and/or year guards attached

2. Should be worn on the left lapel and with no other pins

3. Should have guards attached to the left of the membership pin

X. Chapter offices and duties

(NOTE· Every chapter should have at least these eight offices.)

A. President

(NOTE: The symbol of this office is a gavel.)

1. Presides over all meetings

2. Serves as an ex-officio member on all committees

B. Vice-president

(NOTE: The symbol of this office is a torch.)

1. Assists president

2. Directs all committee work

3. Assumes responsibility for guest speakers and other chapter meeting programs

INFORMATION SHEET

C. Secretary

(NOTE: The symbol for this office is a quill.)

1. Prepares agenda
2. Records attendance
3. Keeps minutes of all meetings

D. Treasurer--Keeps financial records

(NOTE: The symbol of this office is a key.)

E. Historian--Keeps chapter of the year entry

(NOTE: The symbol of this office is a scroll.)

F. Reporter

(NOTE: The symbol for this office is a winged pen.)

1. Reports chapter news to city's newspaper(s), radio and television stations, school papers, and national and state DECA publications
2. Is responsible for the chapter newsletters

G. Parliamentarian--Informs members on correct parliamentary procedure

(NOTE: The symbol for this office is a maze.)

H. Chaplain--Takes charge of religious exercises during meetings and banquets; supports morale of members and promotes unity within the chapter

(NOTE: The symbol of this office is a cross.)

XI. State officer action team (to be completed by DE teacher-coordinator) (Transparency 2)

A. President

B. Vice-president

C. Secretary

D. Treasurer

E. Historian

INFORMATION SHEET

F. Reporter

G. Parliamentarian

H. Chaplain

I. State advisor

XII. National officer action team (to be completed by DE teacher-coordinator)

A. President

B. Vice-president

C. Secretary-Treasurer

D. Regional vice-presidents

1. Southern

2. Western

3. North Atlantic

4. Central

XIII. DECA publications

A. *Oklahoma DECA*

(NOTE: This is a state newspaper published four times a year.)

B. *DECA Distributor*

(NOTE: This is a national magazine published four times a year. The *Distributor* was published by the Oklahoma state DE staff from 1948-1953.)

XIV. DECA conferences

A. District chapter officers' training conference, usually held in October

B. State Leadership Conference held each March

C. National Career Development Conference held each spring

D. Southern Region Conference held in one of the thirteen southern states

INFORMATION SHEET

XV. Competitive activities

- A. State level
  - 1. Creative entry-Vocational notebook
  - 2. Participating events
    - a. Mathematics of retailing
    - b. Business vocabulary
    - c. Parliamentary procedure
- B. State and national level
  - 1. Creative entries
    - a. Merchandise manual
    - b. Area of distribution manual
    - c. Individual marketing studies
      - 1) Jewelry industry
      - 2) Department store
      - 3) Food industry
      - 4) Service industry
      - 5) Automotive and petroleum industry
      - 6) Specialty store
      - 7) Furniture industry
      - 8) Variety store
    - d. Creative marketing project--Class project
  - 2. Participating events
    - a. Sales demonstration
    - b. Display
    - c. Advertising

INFORMATION SHEET

- d. Public speaking
- e. Job interview
- f. Student of the Year

  (NOTE: One boy and one girl are chosen each year.)

XVI. Chapter awards

- A. C. K. Reiff Award
  - 1. Given when a chapter accumulates 1500 local activity points
  - 2. Named after one of the first supervisors and teacher-educators for distributive education

    (NOTE: C. K. Reiff was also the first editor of the *DECA Distributor.*)

- B. M. J. DeBenning Award--Chapter of the year award given to the chapter which accumulates the most points for members placing in individual competitive activities and local activity points earned during the year from state conference to state conference

  (NOTE: Mr. DeBenning was the state supervisor for distributive education and a leader in DECA for 31 years. He was co-author of the original National DECA Constitution. The chapter which receives this award then competes for the national chapter of the year award.)

- C. Other individual and chapter awards--Given during interscholastic meets at Oklahoma State University and Central State University

XVII. Scholarships

- A. National DECA Scholarship-Loan Award--Given by the DECA Foundation to assist and encourage continued study in marketing and distribution
- B. Sales and Marketing Executives of Oklahoma City Scholarship--$2,000 scholarship given to a student wishing to major in business or distributive education
- C. M. J. DeBenning Scholarship--Given by the Oklahoma Restaurant Association to a student wishing to continue his/her education in the food service industry
- D. C. R. Anthony Company Scholarship--$1,000 scholarship given to a DE student from Oklahoma, Texas, or New Mexico who is employed with the C.R. Anthony Company

INFORMATION SHEET

E. Collegiate DECA scholarships--Given by Central State University and Oklahoma State University

F. Scholarships available from various junior college middle management programs

XVIII. Other vocational student organizations

A. FBLA (Future Business Leaders of America)

(NOTE: This is an organization primarily for students being trained in office skills such as typing, filing, and stenography.)

B. FHA (Future Homemakers of America)

(NOTE: This is an organization for students receiving training in skills such as commercial foods, child care, and sewing.)

C. FFA (Future Farmers of America)

(NOTE: This is an organization for students receiving training for careers such as agriculture, animal science, horticulture, agri-business, and welding.)

D. OHOSO (Oklahoma Health Occupations Student Organization)

(NOTE: This is an organization for students receiving training for health occupations careers.)

E. VICA (Vocational Industrial Clubs of America)

(NOTE: This is an organization for students receiving training for skills, such as carpentry, electronics, auto mechanics, cosmetology, and many manufacturing jobs.)

XIX. Order of business

A. Meeting called to order

B. Special program of a serious nature

(NOTE: This could be a program such as the opening ceremony, flag salute, saying DECA creed, or devotional.)

C. Meal (if a meal function)

D. Reading minutes of previous meeting and taking roll

E. Treasurer's report

F. Committee reports

INFORMATION SHEET

- G. Unfinished business
- H. New business
- I. Program
- J. Announcements, introductions, or closing ceremony
- K. Adjournment
- L. Refreshments and recreation

XX. Good DECA chapter meeting

- A. Advance planning and practice by the executive committee

  (NOTE: It is suggested that an agenda be prepared ahead of time.)
- B. Arranging the seating plan so everyone can see the program
- C. Proceeding according to order of business
- D. Conducting business according to parliamentary procedure
- E. Preparing written and oral committee's, secretary's, and treasurer's reports
- F. Beginning and ending on time
- G. Moving along with "snap" to prevent boredom and wasted time
- H. All members expressing appreciation to guests for their attendance
- I. All members being involved in at least one committee
- J. Proceeding with minimum participation by the advisors(s)
- K. Helping with any clean-up duties

XXI. Characteristics of a good chairperson

- A: Be impartial
- B. Inspire confidence in the members
- C. Provide leadership
- D. Ask if there are any additions and corrections to the minutes
- E. Ask three times if there is any more discussion before voting unless there is limited debate
- F. Repeat motions and amendments exactly as they were stated before voting

INFORMATION SHEET

XXII. Meaning of gavel raps

A. Rapping once--To declare or close

B. Rapping twice--To call to order

C. Rapping three times--Everyone should stand

XXIII. How to introduce a motion

A. Have only one main motion on the floor at a time

B. Raise your hand until recognized by the chair

C. Stand and address the chair as "Mr. Chairman"

D. Say "I move . . . " not "I make a motion . . . ' or "I move that . . ."

E. Word all motions in a positive way so that a "yes" vote means the membership is in favor of the proposed motion

XXIV. Common motions

A. Adjourn--Takes precedence over all other motions

B. Refer to committee--Have a committee do further work before presenting the proposal to the entire group

C. Lay on table--Postpone until a later date

(NOTE: The group must vote to remove matter from the table before further discussion.)

D. Point of order--May interrupt when someone is violating the proper procedures and rights of others

E. Question--Called out informally by member when ready to vote on pending question or motion

F. Amendment--Adding, changing, or omitting something to a motion

G. Amend amendment--Adding, changing, or omitting something to an amendment

H. Friendly amendment--Adding, changing, or omitting something to a motion or amendment with the approval of the person making the motion or amendment; does not require a vote

I. Point of information--Interrupting to get additional information on a subject

J. Point of personal privilege--Asking the chair for the privilege to make a short point after discussion has ended

INFORMATION SHEET

K. Suspend rules--Requires 2/3 vote

XXV. Introduction of guest speakers

A. Greet guests ahead of time, make them feel comfortable, and gather any necessary information from the speaker

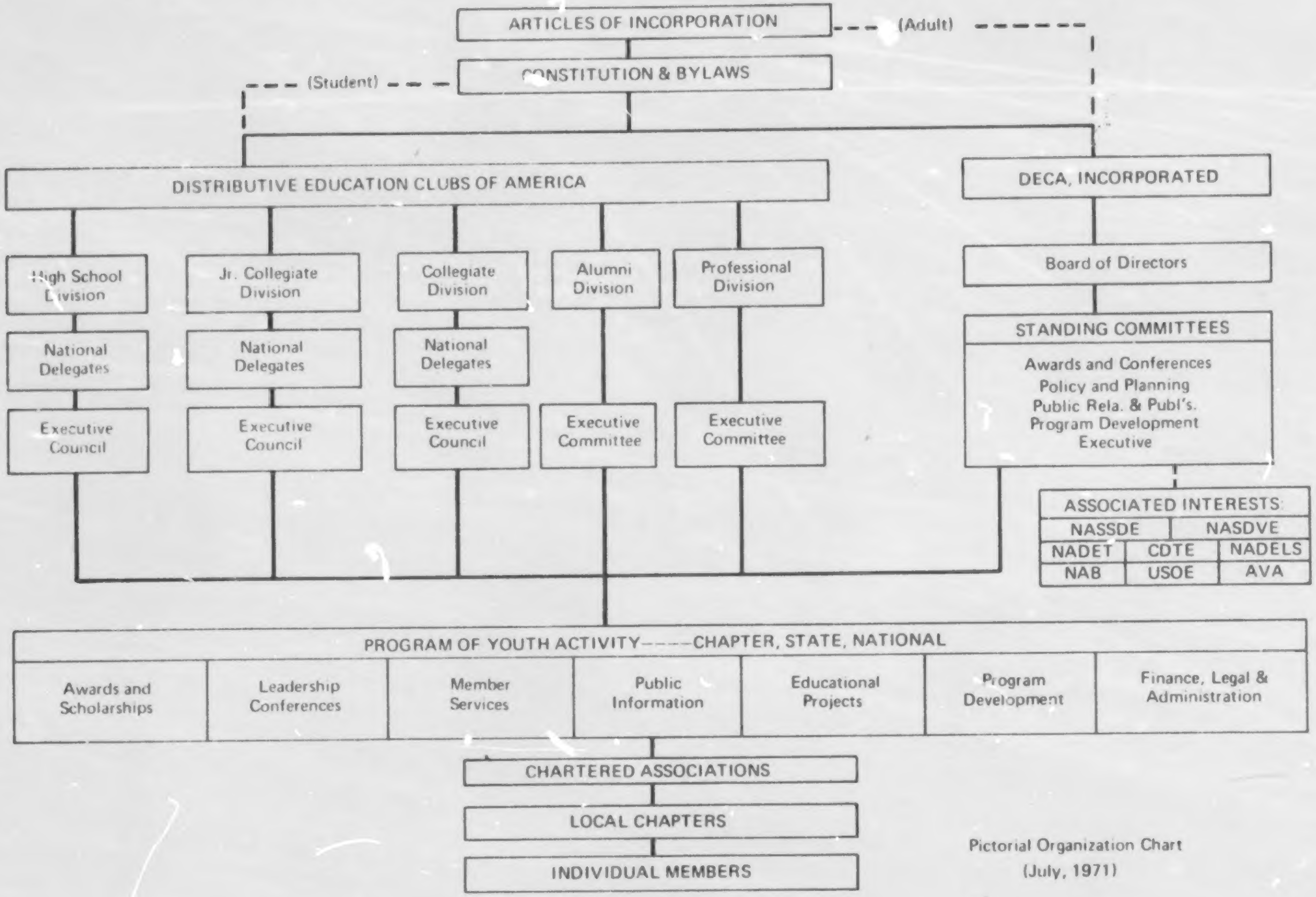
B. Give a brief resumé of the guest, saving his/her name for last

C. Ask questions when the speaker gives the opportunity to do so

D. Express sincere appreciation for speaker's time and trouble after the presentation is completed

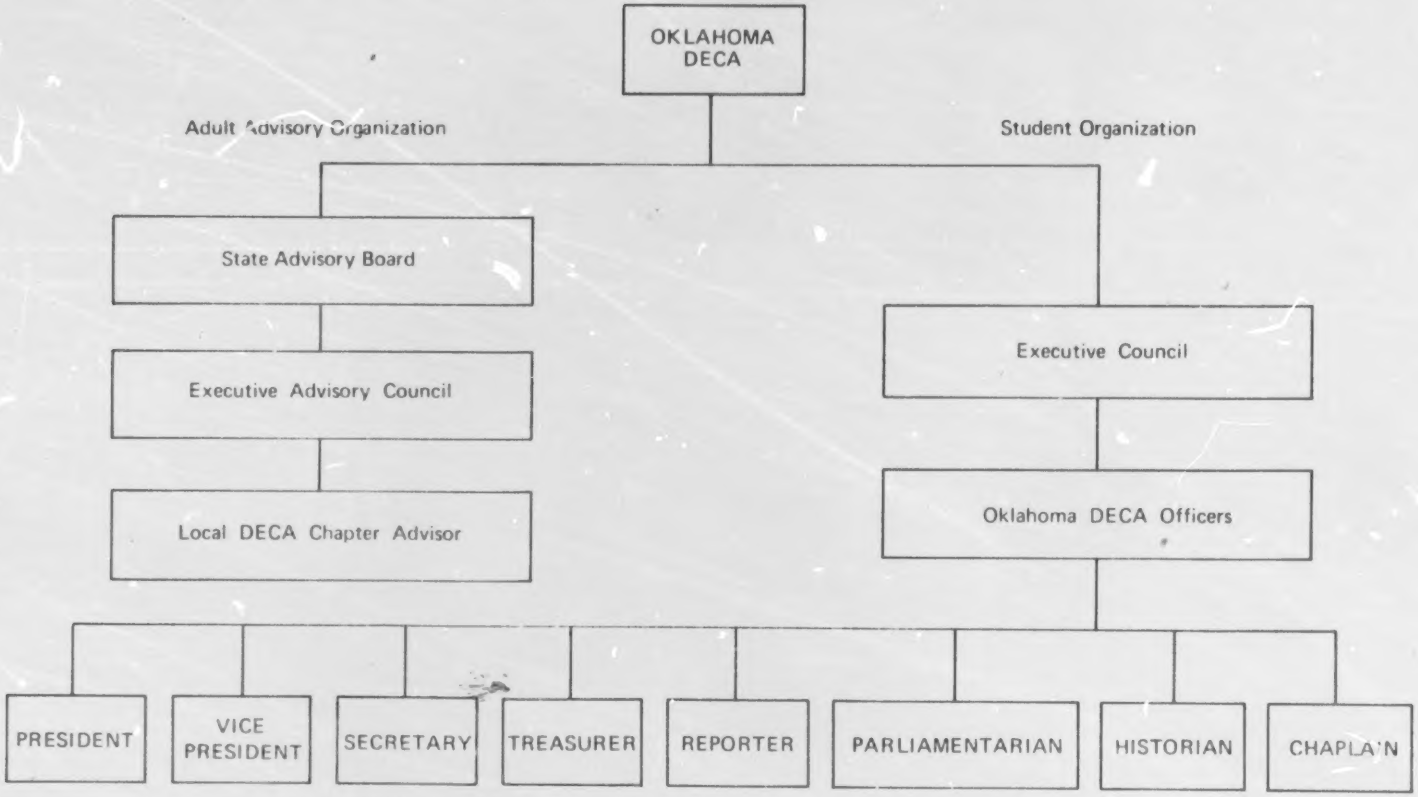
E. Follow up with a thank-you note, gift, and/or honorarium

National DECA Organization Chart


ARTICLES OF INCORPORATION
(Adult)
CONSTITUTION & BYLAWS
(Student)
DISTRIBUTIVE EDUCATION CLUBS OF AMERICA
DECA, INCORPORATED
High School Division
Jr. Collegiate Division
Collegiate Division
Alumni Division
Professional Division
National Delegates
National Delegates
National Delegates
Executive Council
Executive Council
Executive Council
Executive Committee
Executive Committee
Board of Directors
STANDING COMMITTEES
Awards and Conferences
Policy and Planning
Public Rela. & Publ's.
Program Development
Executive
ASSOCIATED INTERESTS
NASSDE
NASDVE
NADET
CDTE
NADELS
NAB
USOE
AVA
PROGRAM OF YOUTH ACTIVITY----CHAPTER, STATE, NATIONAL
Awards and Scholarships
Leadership Conferences
Member Services
Public Information
Educational Projects
Program Development
Finance, Legal & Administration
CHARTERED ASSOCIATIONS
LOCAL CHAPTERS
INDIVIDUAL MEMBERS

Pictorial Organization Chart
(July, 1971)

Oklahoma Association of DECA
Organization Chart



OKLAHOMA DECA

Adult Advisory Organization

State Advisory Board

Executive Advisory Council

Local DECA Chapter Advisor

Student Organization

Executive Council

Oklahoma DECA Officers

PRESIDENT

VICE PRESIDENT

SECRETARY

TREASURER

REPORTER

PARLIAMENTARIAN

HISTORIAN

CHAPLAIN

DECA
UNIT II

TEST

1. Match the terms on the right to the correct definitions by placing the appropriate numbers in the blanks provided.

_____a. Organization established to provide funds for national scholarship-loan awards

_____b. Advisory committee for board of directors made up of representatives from companies which contribute financial support to DECA

_____c. Committee which sets policies for DECA and consists of fifteen members including a national DECA officer and chapter advisor

_____d. Governing body of DECA made up of DE state supervisors from each state association

_____e. Person who represents the chapter or state association in handling business and electing officers during the state and national conferences

_____f. Person responsible for DECA activities in the state

_____g. Student organization for students enrolled in the distributive education program

_____h. Board made up of Congressmen who actively support DECA

1. DECA
2. DECA Foundation
3. Voting delegate
4. National Advisory Board
5. Congressional Advisory Board (CAB)
6. State advisor
7. DECA, Inc.
8. DECA, Inc., Board of Directors

2. Write a short paragraph about the origin and development of DECA.

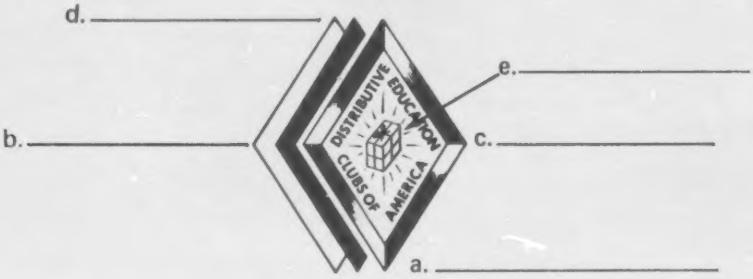
3. Discuss the divisions of DECA.

4. List the two colors of DECA and the meaning of each.

   a.

   b.

5. Identify the parts of the DECA emblem.


d.
e.
b.
DISTRIBUTIVE EDUCATION
CLUBS OF AMERICA
c.
a.

6. State the meaning of each part of the DECA emblem.

   a.

   b.

   c.

   d.

   e.

7. Recite the DECA creed.

   (NOTE: If this activity has not been accomplished prior to the test, ask the instructor when it should be completed.)

8. State the DECA tagline.

9. Describe the official dress of DECA members and the appropriate way to wear the uniform and jewelry.

10. Discuss the chapter offices and their duties.

11. Name the present state officer action team.

    a. President--

    b. Vice-president--

    c. Secretary--

    d. Treasurer--

    e. Historian--

    f. Reporter--

    g. Parliamentarian--

    h. Chaplain--

    i. State advisor--

12. Name the present national officer action team.

    a. President--

    b. Vice-president--

    c. Secretary-Treasurer--

    d. Regional vice-presidents

        1) Southern--

        2) Western--

        3) North Atlantic--

        4) Central--

13. Name two DECA publications.

    a.

    b.

14. Select from the following list the DECA conferences which students may be able to attend. Place an "X" in the correct blanks.

    ______a. State Career Development Conference

    ______b. State Leadership Conference

    ______c. National Career Development Conference

    ______d. District chapter officers' training conferences

    ______e. National Leadership Conference

    ______f. Professional Improvement Conference

    ______g. Southern Region Conference

15. Select from the list below and on the next page those DECA competitive activities which students may enter. Place an "X" in the correct blanks.

    ______a. Vocational notebook

    ______b. Secretary-treasurer's book

    ______c. Business vocabulary

    ______d. Scrapbook

    ______e. Welding

_____f. Computer science

_____g. Typing

_____h. Parliamentary procedure

_____i. Mathematics of retailing

_____j. Public speaking

_____k. Merchandise manual

_____l. Area of distribution manual

_____m. Surveys

_____n. Savings

_____o. Individual marketing studies

_____p. Creative marketing project

_____q. Advertising campaign project

_____r. Advertising

_____s. Display

_____t. Job interview

_____u. Student of the Year

16. Discuss two chapter awards.

17. Discuss three DECA scholarships for which students may apply.

18. Select from the following list the other vocational student organizations in Oklahoma. Place an "X" in the correct blanks.

______a. FTA	______f. Scouts
______b. FBLA	______g. VICA
______c. 4-H	______h. FHA
______d. FFA	______i. OHOSO
______e. Junior Achievement	

19. List the order of business.

a.

b.

c.

d.

e.

f.

g.

h.

i.

j.

k.

l.

20. Select from the following list those things that make a good DECA chapter meeting. Place an "X" in the correct blanks.

______a. Advance planning and practice by the executive committee

______b. Arranging the seating plan so everyone can see the program

______c. Proceeding according to order of business

______d. Conducting business according to parliamentary procedure

______e. Preparing written and oral committee's, secretary's, and treasurer's reports

______f. Beginning and ending on time

_____g. Moving along with "snap" to prevent boredom and wasted time

_____h. All members expressing appreciation to guests for their attendance

_____i. All members being involved in at least one committee

_____j. Proceeding with minimum participation by the advisor(s)

_____k. Helping with any clean-up duties

21. List three characteristics of a good chairperson.

    a.

    b.

    c.

22. Describe the action called for when the chairperson raps the gavel once, twice, and three times.

23. Describe the proper way to introduce a motion.

24. Match the common motions on the right to the correct definitions. Place the appropriate numbers in blanks provided.

______a. Requires 2/3 vote

______b. Interrupting to get additional information on a subject

______c. Takes precedence over all other motions

______d. Postpone until a later date

______e. Adding, changing, or omitting something to a motion

______f. Adding, changing, or omitting something to a motion or amendment with the approval of the person making the motion or amendment; does not require a vote

______g. Have a committee do further work before presenting the proposal to the entire group

______h. May interrupt when someone is violating the proper procedures and rights of others

______i. Called out informally by member when ready to vote on pending question or motion

______j. Adding, changing, or omitting something to an amendment

______k. Asking the chair for the privilege to make a short point after discussion has ended

1. Adjourn
2. Lay on table
3. Point of order
4. Question
5. Amendment
6. Amend amendment
7. Friendly amendment
8. Suspend rules
9. Point of information
10. Point of personal privilege
11. Refer to committee

25. Describe the procedure for introducing guest speakers.

DECA
UNIT II

ANSWERS TO TEST

1.	a.	2	e.	3
	b.	4	f.	6
	c.	8	g.	1
	d.	7	h.	5

2. Paragraph should include:

   a. Need for distributive education training was met by passage of George Deen Act in 1937

   b. Student organizations to develop leadership and promote careers began to spring up under many different names

   c. First statewide meeting in Oklahoma was held in Oklahoma City in 1942

   d. First national conference held in 1946 in Memphis, Tennessee

   e. Oklahoma is one of the seventeen charter state associations

   f. Today there are fifty-two state associations, including ones in the District of Colombia and Puerto Rico

3. Discussion should include:

   a. High school--High school students enrolled in a distributive education program

   b. Junior collegiate--Students enrolled in middle management programs in junior and community colleges

   c. Collegiate--Students majoring in distributive education and/or alumni enrolled in a college or university with a DE teacher education program

   d. Alumni--Organization of graduates from the high school, junior collegiate, and/or collegiate divisions who wish to continue their interest in and support of DE and DECA

   e. Professional--Organization of teachers, business people, parents, and other interested people who support DE and DECA

4. a. Blue--Suggests sincerity and genuineness

   b. Gold--Suggests crowning success which comes to one who lives usefully and wisely

5. a. Vocational understanding
   b. Civic consciousness
   c. Social intelligence
   d. Leadership development
   e. Wrapped package and rays of sunshine

6. a. Vocational understanding--Distributive education graduate is prepared to take his/her place in the business world
   b. Civic consciousness--Each student recognizes his responsibility to his/her community
   c. Social intelligence--DECA member has an opportunity to develop socially
   d. Leadership development--DECA member has an opportunity to assume responsibility as a leader and follower
   e. Wrapped package and rays of sunshine--Personal satisfaction from doing a job well

7. Evaluated to the satisfaction of the instructor

8. Developing future leaders in marketing and distribution

9. Description should include:
   a. DECA blazer
      1) Consists of navy blue coat with DECA emblem on left breast pocket
      2) Should be worn proudly with appropriate clothing
      3) Must not be worn if member is smoking
   b. Membership pins
      1) Consists of DECA emblem which may have officer and/or year guards attached
      2) Should be worn on the left lapel and with no other pins
      3) Should have guards attached to the left of the membership pin

10. Discussion should include:
    a. President
        1) Presides over all meetings
        2) Serves as an ex-officio member on all committees
    b. Vice-president
        1) Assists president
        2) Directs all committee work
        3) Assumes responsibility for guest speakers and other chapter meeting programs
    c Secretary
        1) Prepares agenda
        2) Records attendance
        3) Keeps minutes of all meetings
    d. Treasurer--Keeps financial records
    e. Historian--Keeps chapter of the year entry
    f. Reporter
        1) Reports chapter news to city's newspaper(s), radio and television stations, school papers, and national and state DECA publications
        2) Is responsible for the chapter newsletters
    g. Parliamentarian--Informs members on correct parliamentary procedure
    h. Chaplain--Takes charge of religious exercises during meetings and banquets; supports morale of members and promotes unity within the chapter
11. To be completed by the DE teacher-coordinator each year
    a. President--
    b. Vice-president--
    c. Secretary--
    d. Treasurer--
    e. Historian--
    f. Reporter--

- g. Parliamentarian--
- h. Chaplain--
- i. State advisor--

12. To be completed by the DE teacher-coordinator each year
    - a. President--
    - b. Vice-president--
    - c. Secretary-Treasurer--
    - d. Regional vice-presidents
        - 1) Southern--
        - 2) Western--
        - 3) North Atlantic--
        - 4) Central--
13. a. *DECA Distributor*
    - b. *Oklahoma DECA*
14. b, c, d, g
15. a, c, h, i, j, k, l, o, p, r, s, t, u
16. Discussion should include two of the following:
    - a. C. K. Reiff Award
        - 1) Given when chapter accumulates 1500 local activity points
        - 2) Named after one of the first supervisors and teacher-educators fo distributive education
    - b. M. J. DeBenning Award--Chapter of the year award given to the chapter which accumulates the most points for members placing in individual competitive activities and local activity points earned during the year from state conference to state conference
    - c. Other individual and chapter awards--Given during interscholastic meets at Oklahoma State University and Central State University

17. Discussion should include three of the following:

    a. National DECA Scholarship-Loan Award--Given by the DECA Foundation to assist and encourage continued study in marketing and distribution

    b. Sales and Marketing Executives of Oklahoma City Scholarship--$2,000 scholarship given to a student wishing to major in business or distributive education

    c. M. J. DeBenning Scholarship--Given by the Oklahoma Restaurant Association to a student wishing to continue his/her education in the food service industry

    d. C. R. Anthony Company Scholarship--$1,000 scholarship given to a DE student from Oklahoma, Texas, or New Mexico who is employed with the C. R. Anthony Company

    e. Collegiate DECA scholarships--Given by Central State University and Oklahoma State University

    f. Scholarships available from various junior college middle management programs

18. b, d, g, h, i

19. a. Meeting called to order

    b. Special program of a serious nature

    c. Meal (if a meal function)

    d. Reading minutes of previous meeting and taking roll

    e. Treasurer's report

    f. Committee reports

    g. Unfinished business

    h. New business

    i. Program

    j. Announcements, introductions, or closing ceremony

    k. Adjournment

    l. Refreshments and recreation

20. a, b, c, d, e, f, g, h, i, j, k

21. Any three of the following:

    a. Be impartial

    b. Inspire confidence in the members

    c. Provide leadership

    d. Ask if there are any additions and corrections to the minutes

    e. Ask three times if there is any more discussion before voting unless there is limited debate

    f. Repeat motions and amendments exactly as they were stated before voting

22. Description should include:

    a. Rapping once--To declare or close

    b. Rapping twice--To call to order

    c. Rapping three times--Everyone should stand

23. Description should include:

    a. Have only one main motion on the floor at a time

    b. Raise your hand until recognized by the chair

    c. Stand and address the chair as "Mr. Chairman"

    d. Say "I move . . . " not "I make a motion . . . " or "I move that . . . "

    e. Word all motions in a positive way so that a "yes" vote means the membership is in favor of the proposed motion

24. a. 8

    b. 9

    c. 1

    d. 2

    e. 5

    f. 7

    g. 11

    h. 3

    i. 4

    j. 6

    k. 10

25. Description should include:

a. Greet the guests ahead of time, make them feel comfortable, and gather any necessary information from the speaker

b. Give a brief resumé of the guest, saving his/her name for last

c. Ask questions when the speaker gives the opportunity to do so

d. Express sincere appreciation for the speaker's time and trouble after the presentation is completed

e. Follow up with a thank-you note, gift, and/or honorarium

JOB APPLICATION AND INTERVIEW
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to locate and apply for a job. The student should be able to prepare a data sheet, application form, letter of application, and follow-up letter. He or she should be able to make preparations for an interview and to conduct himself/herself effectively during the interview. The student should be able to discuss employment agencies. This knowledge will be evidenced through demonstration and by scoring eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with job application and interview to the correct definitions.
2. Discuss employment agencies.
3. Tell how a person looking for a job can use different sources of information.
4. List items which an applicant may need to prepare when applying for a job.

JOB APPLICATION AND INTERVIEW
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

A. Provide student with objective sheet.

B. Give pretest using objective sheet.

C. Order films and filmstrips.

D. Provide student with information and assignment sheets.

E. Make transparencies.

F. Discuss unit and specific objectives.

G. Discuss information and assignment sheets.

H. Provide assignments similar to those contained in the unit for appropriate practice and evaluation until satisfied that the objective has been achieved.

I. Obtain employment agency contracts for use in classroom discussion.

J. Obtain additional job application forms for use on Assignment Sheet #5.

K. Provide sufficient newspaper classified ad pages for use on assignment.

L. Contact resource people such as owner of private employment agency, state employment office director, or a personnel director. They can serve as guest speakers or can help evaluate job interviews in the classroom or at his/her place of business. Have students write brief summary of the speaker's presentation, including the speaker's name and occupation.

M. Take picture of each student to attach to the resume.

N. Plan for using video tape during job interview.

O. Plan for using a teletrainer.

P. Give test.

Q. Reteach if necessary.

R. Test again until minimum standard is reached.

II. Student:

- A. Read objective sheet.
- B. Study information sheet.
- C. Take notes.
- D. Complete assignment sheets.
- E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

- A. Objective sheet
- B. Information sheet
- C. Transparency master: TM 1--Where to Look for a Job
- D. Assignment sheets
    1. Assignment Sheet #1--Personal Data Sheet
    2. Assignment Sheet #2--Letter of Application
    3. Assignment Sheet #3--Appointment by Phone
    4. Assignment Sheet #4--Job Application Form
    5. Assignment Sheet #5--Job Interview
    6. Assignment Sheet #6--Interview Questions
    7. Assignment Sheet #7--Employment Test
    8. Assignment Sheet #8--Private Employment Agency Math
    9. Assignment Sheet #9--Follow-Up Letter
- E. Answers to assignment sheets
- F. Test
- G. Answers to test

II. References:

A. Mason, Ralph E., et al. *Marketing and Distribution.* New York: Gregg-McGraw-Hill Book Company, 1974.

B. Richert, Henry G., et al. *Retailing Principles & Practices.* New York: McGraw-Hill Book Company, 1974.

C. *Can I Get the Job?* Detroit: General Motors Public Relations Staff, 1972.

D. Keeton, Marsha. *Job Application and Interview.* University of Kentucky: Vocational Education Curriculum Development Center of Kentucky, 1973.

E. *Interviewing Women Candidates.* Washington, D.C.: U.S. Civil Service Commission, 1974.

F. Holladay, Jeff. "Campaigning for a Job," *Sunday Oklahoman,* "Orbit Magazine," April 6, 1975, pp. 8-11.

G. *Your Attitude Is Showing.* Austin, Texas: Instructional Materials, Division of Extension, University of Texas, 1972.

III. Films:

(NOTE: Only Oklahoma teachers may order films and filmstrips from the State Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth Avenue, Stillwater, Oklahoma 74074. Out-of-state teachers may purchase and/or rent materials from the addresses listed.)

A. "Applying for a Job." Available from Encyclopedia Britannica Educational Corporation, 425 North Michigan Avenue, Chicago, Illinois 60611.

B. "Getting a Job Is a Job." Available from Dibie-Dash Productions, 4949 Hollywood Boulevard, Suite 217, Hollywood, California 90028.

C. "Your Job: Finding the Right One." Available from Coronet Films, Coronet Building, 63 East South Water Street, Chicago, Illinois 60601.

D. "Your Job: Applying for It." Available from Coronet Films, Coronet Building, 63 East South Water Street, Chicago, Illinois 60601.

IV. Additional materials:

A. Pamphlets

1. "How to Get and Hold the Right Job"

2. "How to Prepare Yourself for Job Interviews"

3. "How to 'Sell Yourself' to an Employer"

   All the above are available from the nearest state employment service office.

4. "Appointment with Tomorrow." Available from Vaseco Inc., 2301 Classen Boulevard, P.O. Box 60274, Oklahoma City, Oklahoma 73106.

B. Filmstrips

1. "Job Interviewing Tips." Available from University of Minnesota; Audio Visual Education Service; 2037 University Avenue, S.E.; Minneapolis, Minnesota 55455.

2. "Your Job Application." Available from University of Minnesota; Audio Visual Education Service; 2037 University Avenue, S.E.; Minneapolis, Minnesota 55455.

   (NOTE: Only Oklahoma teachers may order the above filmstrips from the State Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth, Stillwater, Oklahoma 74074. Out-of-state teachers may purchase and/or rent materials from the addresses listed.)

3. "Preparing for an Interview." Available on free loan from the local J.C. Penny Store.

   6 minutes. This color filmstrip and record present information on how to evaluate personal qualifications for a job, what type of questions might be asked at an interview, and appropriate dress. Revised, 1974.

JOB APPLICATION AND INTERVIEW
UNIT I

INFORMATION SHEET

I. Terms and definitions

A. Agency--Establishment engaged in doing business for another person

B. Classified ad--Advertising that is grouped in certain sections of the newspaper by the product or service offered; primarily contains copy

C. Blind ad--Advertising that does not identify the advertiser; applicant is asked to send a letter of application to a post office box number or to call a certain number

D. Help wanted ad--Advertisement telling what kind of job is available and what the required qualifications are

E. Employment wanted ad--Advertisement placed by individual seeking employment and telling what his/her qualifications are

F. Interview--Formal consultation usually to evaluate the aptitude, training, or progress of a student or prospective employee

G. Legible--Capable of being read; clear

H. Equal opportunity employer--Employer who is making a special effort to assure that no form of discrimination is practiced

I. Employer--One who hires another for compensation

J. Employee--One employed by another usually for wages or salary and in a position below the executive level

K. Personnel management--Area of retailing relating to the selection, training, placement, advancement, and welfare of all employees

L. Employment--Activity in which one engages or is employed; work

M. Personal data sheet--Summary of information about an individual that would be of interest to a prospective employer; may also be referred to as a resumé

N. Application form--Printed form on which the job applicant records information about his/her personal history, job experience, education, and references

INFORMATION SHEET

II. Employment agencies

- A. Types of agencies
  - 1. Private
    - a. Charges a placement fee for services

      (NOTE: Fee-paid jobs mean employer pays placement fee.)
    - b. Collects fee when employment is secured
    - c. Requests contract
    - d. Is controlled by state laws
  - 2. Public
    - a. Does not charge placement fee for services
    - b. Is supported by state or federal government
  - 3. School placement office
- B. Services of both public and private agencies
  - 1. For employees
    - a. Find jobs for workers
    - b. Provide counseling
    - c. Arrange interviews
    - d. Give vocational tests
  - 2. For employers
    - a. Find workers for jobs
    - b. Arrange interviews
    - c. Match applicants to jobs
- C. School placement services
  - 1. Offer job information
  - 2. Offer career guidance through counselors

INFORMATION SHEET

III. Sources of job information and how a person uses them (Transparency 1)

- A. Friend and acquaintance
  - 1. Tells people he wants a job
  - 2. Secures half the jobs this way
- B. Business
  - 1. Writes letters of application
  - 2. Applies at store personnel office
  - 3. Phones for interview
  - 4. Makes out application form
- C. Newspaper
  - 1. Answers classified ads
    - a. Situations wanted columns
    - b. Help wanted ads
    - c. General listings by employment agencies
    - d. Blind ads
  - 2. Secures information about special courses
- D. Former employer
  - 1. Asks for letter of recommendation
  - 2. Asks for references to other businessmen
- E. Employment agency
  - 1. Requests counseling
  - 2. Takes vocational tests
  - 3. Makes out application forms
- F. Window sign
  - 1. Watches for sign in store window
  - 2. Inquires about the job opening

INFORMATION SHEET

G. Union

1. Visits hiring hall

2. Learns about apprenticeship program

IV. Items which applicant may need to prepare when applying for a job (Assignment Sheets #1 - #9)

A. Personal data sheet

B. Letter of application

C. Application form

D. Follow-up letter

Where To Look For A Job

UNEMPLOYED

Friends And Acquaintances

Employment Agencies

Business Person

Counselors

Newspapers

Union

Window Sign

EMPLOYED

JOB APPLICATION AND INTERVIEW
UNIT I

ASSIGNMENT SHEET #1--PERSONAL DATA SHEET

Prepare a personal data sheet using accurate facts about yourself. Use the information shown below and the sample personal data sheet as a guide. It is not necessary to use the exact wording and outline form used on the example, but it is necessary that your personal data sheet be neat, balanced, and contain all the information which might help you get a job. Keep a current copy of the personal data sheet in your file and use it to apply for jobs as a distributive education student and when you graduate.

1. Required information

   a. Appropriate heading

      Example: Personal Data Sheet, Resumé, Data Sheet, or Personal Data

   b. Full name

   c. Complete address including zip code

      (NOTE: If you will soon be moving, use both a present address and a permanent address. The permanent address should be of someone who will know your whereabouts.)

   d. Telephone number including area code

   e. Birthdate or age

   f. Marital status

   g. Height and weight

   h. Health

      (NOTE: "Excellent," "Good," or a one or two-word explanation is usually sufficient. If more explanation is needed, use an asterisk (*) and explain at the bottom of the page any physical limitations which would hinder performance on the job.)

   i. Social security number

   j. Educational background

      (NOTE: Place most recent information about education, work experience, and special activities first.)

ASSIGNMENT SHEET #1

    1) Name and address of schools attended
    2) Dates attended
    3) Degrees (if any)
    4) Grade point average or class ranking
    5) Attendance record
- k. Work experience
    1) Name and address of company
    2) Length of time worked
    3) Brief description of duties
    4) Reason for leaving
- l. Special activities
    1) Membership in school, community, and church organizations
    2) Offices and honors received
- m. Special skills, interests, and leisure time activities
- n. Special training programs in school and business

  (NOTE: DE is a valuable training course to mention.)
- o. References, by permission, to whom future employers might refer

  (NOTE: Three references are usually required on a personal data sheet. Never use relatives as references.)
    1) Teachers
    2) Former employers
    3) Adult friends
    4) Community leaders
- p. Small photograph (optional)

ASSIGNMENT SHEET #1

q. Other information (optional)

(NOTE: This information may be used to individualize your data sheet from others. Communicate something that will help the reader associate your uniqueness with your skills and abilities.)

1) Philosophy

2) Values in certain areas

3) Unique situation

2. Suggestions for preparation

a. Be accurate

b. Be honest

c. Be brief

(NOTE: Personal data sheets should be kept to one page if possible.)

3. Uses

a. Take two copies to interview

1) Leave one with interviewer

2) Use one as reference in filling out application form

b. Mail one with letter of application

ASSIGNMENT SHEET #1
SAMPLE PERSONAL DATA SHEET

Personal Information

Photograph
(If you desire)

Name: Judy Jobgetter

Address: 830 Myplace
Hometown, Oklahoma 74074

Birthdate: July 2, 1957

Birthplace: Youngtown, Oklahoma

Telephone: (405) 377-2000

Height: 5'3"

Marital Status: Single

Weight: 120 lbs

Health: Excellent

Education

	Name of School	Dates	Degree	Major
College:	Munrow Junior College Nextown, OK 73044	1976-1978	Associate	Middle mgmt.

Grade point average 3.5

(Fifty percent of expenses earned through part-time employment, loans, and scholarships.)

High School:				
	Rahrah High School	1972-1976	--	Related Courses: DE-2 semesters Eng.-6 semesters Math-2 semesters

Grade point average: 3.0

Work experience

Employer	Position	From	To	Duties	Reasons for Leaving
XYZ Department Store 123 Broadway Nexttown, OK 73044	Salesperson	1976	1978	Selling Buying Stocking	Part-time and summer while attending college
Fancy Dress Shop 456 Main Street Hometown, OK 74074	Salesperson	1975	1976	Selling Display Record-keeping	Part-time and summer while attending high school

ASSIGNMENT SHEET #1

Special Activities

High school:

Senior class president
DECA secretary
Member of National Honor Society, Pep Club

College:

Delta Epsilon Chi Alpha (business/professional)
Wentz Scholarship recipient

Other:

Red Cross Drive Chairperson
Northside Methodist Church choir leader

Hobbies and Interests

Painting, swimming, and teamwork activities

References

Mr. D. E. Applesauce, DE Teacher-Coordinator
Hometown High School
Hometown, Oklahoma 74074

Mrs. Sally Supervisor, Manager
XYZ Department Store
Nexttown, Oklahoma 73044

Harvey Halo, Manager
Northside Bible and Book Store
987 Genesis Lane
Hometown, Oklahoma 74074

* * * * * * * * * *

(NOTE: This personal data sheet contains information which a person might add after further education and/or work experience. A high school student would omit the "college" section.)

JOB APPLICATION AND INTERVIEW
UNIT I

ASSIGNMENT SHEET #2--LETTER OF APPLICATION

Cut a help wanted ad for a job in marketing from the classified ad section of the local paper. Write a letter of application for the job using the following information and good sample letter as a guide.

1. Form and appearance
    - a. Type or write neatly
    - b. Write on only one side of paper
    - c. Avoid smudges and typographical errors
    - d. Use 8 1/2 x 11 white typing paper, not personal or fancy paper
    - e. Spell, capitalize, and punctuate correctly
    - f. Address and sign correctly
2. Information
    - a. Write to a specific person

      (NOTE: Use "To Whom It May Concern" if answering a blind ad.)
    - b. Be brief
        - 1) State the position you are applying for
        - 2) Avoid details
    - c. State reason for interest in job

      (NOTE: Employers want persons who look for future advancement opportunities rather than just a paycheck.)
    - d. Refer briefly to the main points on the enclosed personal data sheet
    - e. Mention that persons listed on the personal data sheet have given their permission to serve as references
    - f. Request interview at employer's convenience
        - 1) Tell where you can be reached
        - 2) Enclose self-addressed envelope and personal data sheet

ASSIGNMENT SHEET #2

3. Be original in your approach

   a. Attract attention in opening paragraph

      Example:

      Dear Mr. Money:

      Have you ever wished you had an assistant who has experience in sales, display, advertising, and supervising other people? I might be the one.

      Dear Ms. Owner:

      Mr. Coworker informed me that you are in need of a person who can handle the stockroom duties for your store. I believe that my experience and training has taught me how to handle receiving, pricing, and marking duties efficiently and accurately.

   b. Do not be "silly" or "flowery"

4. End the letter properly

   (NOTE: "Sincerely yours" or "Very truly yours" is appropriate.)

5. Use your permanent address for the return address and make sure to include the current date

6. Cover all the points requested in the advertisement in exactly the order asked for, since some prospective employers make it a point of testing the applicant's ability to follow directions

7. What are examples of poor form in the first application letter from Cindy Jones?

ASSIGNMENT SHEET #2

110 Lemon avenue
Somewhere, OK 74074
6/15/75

Mr. John Doe
XYZ Drug Co.
Someplace, Okla. ~~OK~~ 02901

Dear Mr. Doe,

I am writing to ask about a job in your store. I just gradated from high school when I took some courses in D.E.

For a while I worked in a store where I learned many things about it.

I want to work in a store.

Hoping to hear from you soon.

Your friend
Cindy Jones

ASSIGNMENT SHEET #2
SAMPLE LETTER OF APPLICATION

110 Lemon Avenue
Somewhere, Oklahoma 74074
June 15, 1976

Mr. John Doe, Manager
XYZ Drug Company
Someplace, Oklahoma 74074

Dear Mr. Doe:

Please consider this letter an application for the position of salesperson with the XYZ Drug Store.

In June I graduated from Somewhere High School, where I completed two years of distributive education. A record of my high school courses, grades, and previous work experience is included on the attached data sheet.

While enrolled in the distributive education program, I received work experience with Mr. John Smith of the Family Drug Company here in Somewhere. Mr. Smith has given me permission to list his name as a reference.

I enjoyed my work experience with Family Drug Store and should like to continue in this line of work. I would appreciate the opportunity to come in and talk over this matter with you at your convenience. I may be reached at the above address or by telephone at 377-2000.

Sincerely yours,

Cynthia Jones

Cynthia Jones

Enclosure

JOB APPLICATION AND INTERVIEW
UNIT I

ASSIGNMENT SHEET #3--APPOINTMENT BY PHONE

Making an appointment by phone does two things. First, it shows that you are interested in saving the employer's time. Second, it shows that you are thoughtful for asking what would be the best time for you to see the employer.

1. Steps in making an appointment by phone
    a. Plan what you are going to say before you call
    b. State your name and reason for calling

        Example: "Hello, this is Judith Jamison and I'm calling about your ad in last night's paper for a salesperson. May I have an appointment for an interview?"

    c. Ask when would be the best time for you to come in
    d. Record the day, time, and place of the interview
    e. Thank the receptionist for her help
2. Things to remember when calling for an appointment
    a. Keep the receptionist on your side; she is there to help you

        (NOTE: The receptionist is sometimes asked to evaluate the applicant.)

    b. Do not ask over the phone how much the job pays
    c. Be polite and courteous

        (NOTE: Remember that this call is the first contact you may have had with the firm. Make that first impression a good one.)

3. Role play a situation where you make an appointment by phone using the checklist on the following page

ASSIGNMENT SHEET #3

		YES	NO
a.	Was prepared before calling		
b.	Did not have to stammer to find the right words		
c.	Identified himself/herself immediately		
d.	Stated reasons for calling immediately		
e.	Asked the best time for an appointment with the employer		
f.	Was courteous and friendly		
g.	Thanked the receptionist		
h.	Made record of the interview date, hour, and place		

JOB APPLICATION AND INTERVIEW
UNIT I

ASSIGNMENT SHEET #4--JOB APPLICATION FORM

Complete the following application form using the guidelines below. Use information corresponding to the classified ad and to your letter of application. Use information about yourself from your personal data sheet.

(NOTE: Although each business uses its own form, general rules of preparation apply to any form.)

1. Be prepared
    a. Take pen and pencil with you
    b. Take copies of personal data sheet (resumé)
2. Look over entire form before starting to write; do not hurry
3. Follow directions
    a. Note whether information is to be printed or handwritten
    b. Carry out all directions
4. Write clearly, neatly, and legibly
5. Answer briefly
6. Be honest
7. Answer all questions

    (NOTE: If questions do not apply to you, write "Not Applicable" or "N/A" in the space to show that you did not overlook the question.)
8. Include complete information; use personal data sheet
9. Recheck application when finished
10. Avoid cross-outs and obvious erasure marks
11. Do not list any restrictions to the geographic area in which you would work unless you would absolutely not consider other geographic areas
12. Use the word "open" for questions about minimum salary since most employers pay standardized rates and will not negotiate on this

ASSIGNMENT SHEET #4

Position Requested ______________________ Full Time ______ Part Time ______ Hours ________

Second choice ______________________________ Salary expected ______________

If selected when would you be available for work? ______________________________

You are not required to give any information on this form if such is prohibited by law.

REFERENCES (Do not use relatives or former employers)

Name Address Occupation

1. ____

2. ____

EMPLOYMENT HISTORY (Start with Most Recent Employment)						
NAME and ADDRESS	TIME EMPLOYED		POSITION	SALARY		SUPERVISOR
	FROM	TO		START	LEAVING	
(1)						
Phone No.	REASON FOR LEAVING					
(2)						
Phone No.	REASON FOR LEAVING					
(3)						
Phone No.	REASON FOR LEAVING					
(4)						
Phone No.	REASON FOR LEAVING					

Date ______________________ 19 ____ Signature ______________________

DO NOT WRITE BELOW THIS LINE

Interviewed by: ______________________ Date ______________________

Remarks ____

Appearance: Attitude: Stability:

ASSIGNMENT SHEET #4
SAMPLE JOB APPLICATION FORM

Employment Application

PERSONAL DATA

Name Soc. Sec. No. Date of Birth
Address City State
How long at the above address? Phone No.
Last Previous Address City State
Height Weight Maiden Name Husband/Wife's Name
Husband/Wife's Occupation Where employed?
How long? No. of Dependents Children's Ages
Relationship of others Single Married
How long have you lived in this state? City
Who should be notified in case of emergency? Name
Relationship Address
City State Phone No.
Do you own a car? Do you own a health card?
Any felony convictions? If "yes" explain
Have you ever been bonded? Have you ever been refused bond?

NAME: TERM.
HIRED: REASON:
LOCATION: REHIRE:

HEALTH

What is the present condition of your health? Date last physical
List any illnesses in the past year
Do you have any physical defects? Explain

MILITARY SERVICE

Yes No Branch Dates: From To
Rating upon discharge
Type of Discharge: Honorable Medical Other
Are you a member of the National Guard? Reserve Active
Is yearly active duty required? How long? Approximately when?
What is your present draft status?

EDUCATION (CIRCLE LAST YEAR COMPLETED)

	NAME	HIGHEST YEAR COMPLETED	FROM	TO	MAJOR SUBJECTS
GRAMMAR SCHOOL		1 2 3 4 5 6 7 8			
HIGH SCHOOL		9 10 11 12			
COLLEGE		1 2 3 4 5 6			
		How long?			
OTHER		How long?			

JOB APPLICATION AND INTERVIEW
UNIT I

ASSIGNMENT SHEET #5--JOB INTERVIEW

Now that you are prepared for an interview, team up with another student in class. Assume the roles of interviewer and applicant and then switch so each of you gets to play both roles. Apply for the job you now have or for the one for which you wrote the letter of application. Let your other classmates evaluate your performance using the DECA Job Interview Evaluation Form. Video tape the practice sessions if possible. The following information and example may be used as a guideline.

1. Prepare for the interview
    a. Look nice
        1) Be clean
        2) Be well-groomed; neat
        3) Wear appropriate clothes and shoes for the type of job

           (NOTE: If uncertain about what would be appropriate clothes, it is better to dress-up rather than running the risk of dressing too casual or unbusinesslike.)
        4) Take an ink pen and personal data sheet with the information you may need about social security number, references' addresses, dates employed, and dates attended school
    b. Go alone; do not take parents or friends
    c. Do not be late; allow enough time
    d. Find out facts about the interviewer
        1) Name
        2) Title
    e. Know facts about the company
        1) Name
        2) Kind of business
        3) Products and services
        4) Reasons you want to work there

ASSIGNMENT SHEET #5

5) How old the company is and where the plants, offices, or stores are located

2. Meet the receptionist
   a. Smile
   b. Introduce yourself
   c. State that you have an appointment
   d. Follow her instructions
   e. Wait patiently
3. Participate in the interview
   a. Smile
   b. Listen
   c. Enter with poise
   d. Greet the interviewer by name
   e. Shake hands firmly
   f. Introduce yourself
   g. State purpose of call
   h. Be seated only at interviewer's invitation

      (NOTE: Ladies should be cautious to dress modestly and sit properly.)
   i. Do not show signs of nervousness

      (NOTE: If you do not know where to put your hands, leave them on your lap and keep them still.)
   j. Do not place personal things on interviewer's desk
   k. Do not smoke or chew gum
   l. Look alert; look interested and enthusiastic

      (NOTE: Sit slightly forward in the chair to give an alert appearance.)
   m. Be confident
   n. Be courteous

ASSIGNMENT SHEET #5

(NOTE: Words such as *Mr., Mrs., Miss, Ms., please, thank you,* and *sir* never go out of style.)

o. Answer questions clearly; do not interrupt

p. Anticipate questions that might be asked and volunteer proper information

1) Avoid just giving all yes and no answers

2) Avoid criticisms of former employers or competitors

3) Do not talk about personal problems

(NOTE: The interviewer must be interested more in what you can contribute to the business than what the business can do for you. Do not use a sob story about how desperate you are for a job.)

4) Show copies of your work if applicable

5) State that you are willing to start at the beginning salary

6) Find a true, positive statement concerning your reasons for leaving previous jobs, even if you were fired

Examples: "I was laid off, but I learned from my mistakes."

"I left because they did not need as many employees during the slow season."

"The employer needed her daughter to work for awhile."

7) Try to mention your best qualities in relation to something concrete

Example: "I earned 75 percent of my expenses while going to school" is better than "I am a hard worker and want to get ahead."

8) Give the lead back to the interviewer if you find yourself talking too long by saying "Perhaps you have some other questions to ask me?"

9) Be prepared for personal questions about your home life and parents' occupations

10) Avoid questions concerning politics or economics

11) Answer questions about career objectives using specific terms about what you would like to do in the near future in that particular field without limiting your opportunities

ASSIGNMENT SHEET #5

Example: A position in sales or training program that will eventually lead to a marketing or management position. No locational preference

q. Look directly at interviewer

r. Speak in clear, moderate tones

s. Use correct English

(NOTE: Avoid swearing or using slang terms.)

t. Show interest in the company; ask questions

u. Sell yourself

(NOTE: Never refer to yourself as just average or fair. Always look for a positive response.)

v. Do not get flustered

w. Give the interviewer the opportunity to mention salary and fringe benefits

x. Remind the interviewer of the conversation topic if he/she is interrupted by a telephone call

y. Act enthusiastic

4. Close the interview

a. Watch for the signs that the interview is over, such as the interviewer shuffling papers and moving around in his/her chair

b. Ask "May I say one thing more?" or "Would you be interested in . . .?" if the interview seems to be ending before all important selling points have been made

c. Thank interviewer for his/her time

d. Leave promptly

e. Learn from every situation even if the interviewer does not offer the position

5. Follow up interview--Write thank you letter, call, or visit again to express interest in the job and appreciation for the opportunity to interview

6. Example of a job interview

(NOTE: Two students may rehearse this script and read it in front of the class to show how an interview might be conducted.)

ASSIGNMENT SHEET #5

A = Applicant

I = Interviewer

A (Enters room, pauses, smiles, and approaches Mr. Boss with his hand extended to shake hands.) Hello, Mr. Boss. I'm Joe Hunter and am applying for the job which you advertised in Friday's *Daily Blunder*.

I Hello, Mr. Hunter. Won't you have a seat?

A Thank you, sir. I have a personal data sheet which may be helpful to you. (Hands Mr. Boss the personal data sheet and sits down.)

I This is a very well prepared data sheet. Well, Joe, tell me about yourself.

A I'm a junior at Podunk High School where I'm enrolled in distributive education, which is a vocational training program in marketing and distribution. I'm interested in working in a business like yours while going to school and when I graduate. My older brother works in a similar business in Big City, and I think there are a lot of future opportunities in this field.

I Joe, have you had any work experience or are you currently working anywhere?

A Yes, sir. I am working as a courtesy clerk for Marty's Meat Market. I am responsible for keeping the checkout area clean and well-stocked with sacks as well as carrying groceries for the customers. I have also done odd jobs for my relatives and neighbors.

I What do you think you have learned from your job at the meat market?

A Probably the most important thing I have learned is how to deal with customers.

I What kind of person is your employer and how do you get along?

A My employer has several good qualities. He offers very good service to the customers, and we get along well.

I Why do you want to leave?

A I feel there would be more opportunity for me to develop the skills necessary to reach my occupational objective in a business such as yours.

I How did you get the job at the meat market?

A A friend of mine who used to work there recommended me as his replacement.

ASSIGNMENT SHEET #5

I When would you be able to start and what hours could you work?

A I could start work as soon as I give my present employer two weeks notice. I will be able to work from 2:30 to 5:30 on weekdays and all day on weekends and holidays.

I In which school activities are you involved this year?

A I am a member of the student council, glee club, and DECA. I should know about any trips with these groups early enough to make arrangements with you and another employee so there will be no problems with missing work.

I Do you have any financial obligations, such as a car payment?

A No, sir.

I Have you ever had any difficulty with the police other than a traffic violation?

A No, sir.

I How much do you expect to earn?

A I understand from some of the other employees that a person may begin at the minimum wage and advance with time and experience.

I That's right. Here is a brochure explaining our pay scale and other benefits.

A Thank you.

I Thank you for talking to us. We will let you know about the job soon.

A (Stands) Thank you for your time, Mr. Boss. Have a good day. (Shakes hands and leaves.)

JOB APPLICATION AND INTERVIEW
UNIT I

ASSIGNMENT SHEET #6--INTERVIEW QUESTIONS

The following are some additional questions which might be asked when applying for various jobs. Use them as you practice job interviews and keep the assignment sheet to review before going on any actual interviews.

How would you answer the following questions? Why do you think each question might be asked?

1. Where do you go to school? When will you graduate?
2. Do you earn any of your own expense money while you are in school?
3. Why did you leave your previous jobs?
4. What did you like best and what did you like least about your classes?

   (NOTE: This could be teachers, jobs, or employers.)
5. What books have you read lately? What are your favorite magazines?
6. Are you in good health?
7. What do you expect to be doing five or ten years from now? What is your chosen field of work?
8. At what salary do you expect to start?
9. How would you rate your training for this job? Very good? Fair?
10. What are some of your special abilities? What skills do you possess? What machines can you operate?
11. What personal characteristics do you think are needed to succeed in your vocation?
12. In what area do you need the most improvement?
13. Do you like to work with other people or do you work best alone?
14. Do you have any questions you want to ask us?
15. Do you think your extra curricular activities were worth the time you devoted to them?
16. How could you contribute to our organization? Why should we hire you?
17. Tell us about your family and any plans for marriage or further education.

ASSIGNMENT SHEET #6

18. What other jobs have you applied for?
19. Do you have any military obligations to fulfill?
20. Give us an example of a project you finished under pressure.
21. May we write or call your last employer?
22. How many people have you supervised at work or through organizations of which you are a member?
23. How do you feel about the progress you have made salary-wise?
24. Are you living with your parents?
25. Would you be able to work all day Saturday and Sunday?
26. If you could start school (or work) over again what would you do differently?
27. Have you done the best school work of which you are capable?
28. What is your school attendance record?
29. Have you ever taken drugs?
30. Have you ever stolen anything?
31. Do you belong to a church?
32. Do you belong to a civic organization?
33. Do you require attention? Does criticism disturb you?

    (NOTE: This is usually asked in a more subtle and indirect way.)
34. What motivates you?
35. Would you be willing to relocate?
36. What size city do you prefer?
37. Have you saved any money?
38. Define cooperation.
39. What job with our company would you choose if you were entirely free to do so?
40. How do feel about working overtime?

Remember: You never get a second chance to make a good first impression!

Getting a job is a job!

JOB APPLICATION AND INTERVIEW
UNIT I

ASSIGNMENT SHEET #7–EMPLOYMENT TEST

Many different kinds of tests may be given during an application. Usually the tests given relate to the type of work for which one is applying. There is usually a time limit for the test. Do not waste time trying to find trick questions or a pattern to the answers as there are none. Some areas of testing are aptitude, math, comprehension, spelling, and following directions.

Complete the sample portion of the employment test below. If you are unable to figure one out, go on to the others and come back to it later.

1. If Wednesday comes before Tuesday, make two crosses here ____ but if not, make a circle here ____.

2. Circle the number that does not complete the regular sequence of these numbers.

   7 12 8 13 7 14 10 15 11 16 12 17

3. If Alice is younger than Grace, and Mary is younger than Alice, is Grace older than Mary? ______________

4. Complete each problem to make it true.

   a) Eight is equal to twice (   ).

   b) (   ) is equal to 1/2 ten.

5. 5 + 4 = 8
   3 + 5 = 9

   If this problem is correct do nothing, but if the first problem is wrong, underline the second.

6. If January 17 falls on Tuesday, what day does January 1 fall on? ___________

7. A man having $10.00 spent $2.45 for tools and $0.12 for bus fare. How much did he have left? ___________

8. If 3 1/3 bushels cost $25.00, what will 10 bushels cost?

9. Count the number of letters in the alphabet between and including H and T and write the number here. ___________

10. Write on the lines the numbers that follow in regular order.

    a. 7 14 21 28 35 ______________________________
    b. 360 180 90 45 22 1/2 ______________________________

JOB APPLICATION AND INTERVIEW
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ASSIGNMENT SHEET #8--PRIVATE EMPLOYMENT AGENCY MATH

1. Using the terms in the employment agency contract on the following page, figure the fee that would be paid for a part-time job with wages of $2.00 an hour, 23 hours per week for four weeks.

2. a. Sometimes the company which hires a person agrees ahead of time to pay the employment agency fee for the new employee. How much would the fee be for a job which paid $450 per month?

   b. How much would each installment payment be if the new employee pays the fee himself/herself in two equal payments?

   c. If the new employee is paid twice a month, how much would each installment payment be?

   d. If the new employee is paid weekly, how much would each installment payment be?

ASSIGNMENT SHEET #8

SAMPLE EMPLOYMENT CONTRACT

ABC EMPLOYMENT AGENCY

ABC Employment Agency provides this contract to protect you and the agency. It is very important that you read all details carefully and ask for a full explanation of any portion that is not clear to you. Our agency is bonded and licensed by the Oklahoma Department of Labor.

I hereby employ the ABC Employment Agency to assist me in securing a position. I understand that I am to keep all information given to me regarding positions in strict confidence and agree to report the acceptance of a job and the results of the interviews to the ABC Employment Agency. I also understand that if any position is offered me as a result of being sent by this agency, I am obligated to the agency.

Upon acceptance of the position that was secured for me by the ABC Employment Agency, I agree to pay the fee as follows:

15% of 1st full mo. gross pay if pay is 79.99 or less
20% of 1st full mo. gross pay if pay is $80.00 - $119.99
30% of 1st full mo. gross pay if pay is $120.00 - $149.99
40% of 1st full mo. gross pay if pay is $150.00 - $274.99
45% of 1st full mo. gross pay if pay is $275.00 - $499.99
$500.00 and above -- percentage of annual income - to be agreed upon by both parties

(This fee schedule is established by state law.)

_____I will pay the fee in full within 10 days of accepting the job.

_____I will pay in two (2) equal installments if I am paid monthly.

_____I will pay in three (3) equal installments if I am paid twice a month.

_____I will pay in six (6) equal installments if I am paid weekly.

In the event this placement fee is not paid in accordance with the above, I further agree to pay reasonable attorney fees and court charges that are necessary in collecting any balance that I may owe should I become delinquent with payments.

I HAVE CAREFULLY READ THE ABOVE CONTRACT AND FULLY UNDERSTAND ITS CONTENTS AND DO AGREE TO ABIDE BY ITS CONTENTS.

____
Signature

____
Date

JOB APPLICATION AND INTERVIEW
UNIT I

ASSIGNMENT SHEET #9--FOLLOW-UP LETTER

It is sometimes helpful to return to a business and check again on possible job openings. This is often done about a week after the first interview. This short casual visit accomplishes two things. It helps the interviewer remember you, and it shows that you have a sincere interest in working for that company.

However, it is not always possible to have this type of informal atmosphere when applying for a job. In which case, it is always proper to send a follow-up letter.

1. Write a follow-up letter thanking the employer for the interview

   (NOTE: Use any form you wish or follow the format of the sample follow-up letter on the next page.)

2. Make sure your letter meets the following standards
   a. Typed perfectly
   b. Clean, neat, and attractively arranged on the paper
   c. Free from spelling, punctuation, and grammatical errors
   d. Sent within a day or two after the interview

3. Include the following points in your follow-up letter
   a. An expression of appreciation for interviewer's time and interest
   b. A summary of your qualifications and interest in the position
   c. Your name, address, and phone number (to make it easier for your employer to contact you)

4. Make this last bid for the job a prime example of your excellent work habits

ASSIGNMENT SHEET #9

SAMPLE FOLLOW-UP LETTER

820 North Monroe
Stillwater, Oklahoma 74074
September 1, 1976

Mr. John Jones
Personnel Manager
John's Department Store
407 Main Street
Stillwater, Oklahoma 74074

Dear Mr. Jones:

Thank you for interviewing me for the salesperson position in your store. I feel that working for John's Department Store would be enjoyable and that I could do the selling and inventory work which the position requires. I hope that I will have the opportunity to prove my worth.

The application form you gave me is enclosed.

I will be available for work September 5. You may call me at my home after 3:30. The number is 377-3307.

Sincerely yours,

Miss Judith Jamison

Miss Judith Jamison

Enclosure

JOB APPLICATION AND INTERVIEW
UNIT I

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #7

1. Circle
2. 7
3. Yes
4. a. 4
   b. 5
5. Underline second
6. Sunday
7. $7.43
8. $75.00
9. 13
10. a. 42, 49
    b. 11 1/4, 5 5/8

Assignment Sheet #8

1. $73.60
2. a. $202.50
   b. Two payments of $101.25 each
   c. Three payments of $67.50 each
   d. Six payments of $33.75 each

JOB APPLICATION AND INTERVIEW
UNIT I

TEST

1. Match the terms on the right to the correct definitions on the left by placing the appropriate numbers in the blanks provided.

_____a. Area of retailing relating to the selection, training, placement, advancement, and welfare of all employees

_____b. Employer who is making a special effort to assure that no form of discrimination is practiced

_____c. Advertisement telling what kind of job is available and what the required qualifications are

_____d. Establishment engaged in doing business for another person

_____e. Formal consultation usually to evaluate the aptitude, training, or progress of a student or prospective employee

_____f. One employed by another usually for wages or salary and in a position below the executive level

_____g. Advertising that does not identify the advertiser; applicant is asked to send a letter of application to a post office box number or to call a certain number

_____h. Activity in which one engages or is employed; work

_____i. One who hires another for compensation

_____j. Capable of being read; clear

_____k. Advertisement placed by individual seeking employment and telling what his/her qualifications are

_____l. Advertising that is grouped in certain sections of the newspaper by the product or service offered; primarily contains copy

1. Employment
2. Agency
3. Blind ad
4. Help wanted ad
5. Interview
6. Equal opportunity employer
7. Employee
8. Personnel management
9. Legible
10. Employment wanted ad
11. Employer
12. Classified ad
13. Application form
14. Personal data sheet

______m. Printed form on which the job applicant records information about his/her personal history, job experience, education, and references

______n. Summary of information about an individual that would be of interest to a prospective employer; may also be referred to as a resumé

2. Discuss in writing both public and private employment agencies.

3. Tell how a person looking for a job can use different sources of information.

4. List the items which an applicant may need to prepare when applying for a job.

   a.

   b.

   c.

   d.

JOB APPLICATION AND INTERVIEW
UNIT I

ANSWERS TO TEST

1.
   - a. 8
   - b. 6
   - c. 4
   - d. 2
   - e. 5
   - f. 7
   - g. 3
   - h. 1
   - i. 11
   - j. 9
   - k. 10
   - l. 12
   - m. 13
   - n. 14

2. Discussion should include:
   - a. Types of agencies
     - 1) Private
       - a) Charges a placement fee for services
       - b) Collects fee when employment is secured
       - c) Requests contract
       - d) Is controlled by state laws
     - 2) Public
       - a) Does not charge placement fee for services
       - b) Is supported by state or federal government
     - 3) School placement office
   - b. Services of both public and private agencies
     - 1) For employees
       - a) Find jobs for workers
       - b) Provide counseling
       - c) Arrange interviews
       - d) Give vocational tests
     - 2) For employers
       - a) Find workers for jobs

- b) Arrange interviews
- c) Match applicants to jobs

c. School placement services

- 1) Offer job information
- 2) Offer career guidance through counselors

3. a. Friend and acquaintance

- 1) Tells people he wants a job
- 2) Secures half the jobs this way

b. Business

- 1) Writes letters of application
- 2) Applies at store personnel office
- 3) Phones for interview
- 4) Makes out application form

c. Newspaper

- 1) Answers classified ads
  - a) Situations wanted columns
  - b) Help wanted ads
  - c) General listings by employment agencies
  - d) Blind ads
- 2) Secures information about special courses

d. Former employer

- 1) Asks for letter of recommendation
- 2) Asks for references to other businessmen

e. Employment agency

- 1) Requests counseling
- 2) Takes vocational tests
- 3) Makes out application forms

f. Window sign

1) Watches for sign in store window

2) Inquires about the job opening

g. Union

1) Visits hiring hall

2) Learns about apprenticeship program

4. a. Personal data sheet

b. Application form

c. Letter of application

d. Follow-up letter

HANDLING MONEY
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to count change with or without an automatic change dispenser, figure sales tax, and write a sales ticket correctly. He/she should be able to discuss what to look for when accepting checks, credit cards, money orders, and traveler's checks. He/she should also be able to take precautions against short change artists, counterfeiters, robbers, and other kinds of money manipulators. This knowledge will be evidenced by scoring eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with handling money to the correct definitions.
2. Distinguish between counting change without an automatic change dispenser and counting change with an automatic change dispenser.
3. Write the two, three, and four percent sales tax tables.
4. Select the errors on a check.
5. Discuss what to look for when accepting credit cards.
6. Discuss what to look for when accepting money orders.
7. Discuss what to look for when accepting traveler's checks.
8. Select from a list the reasons for writing sales tickets correctly.
9. Write a sales ticket.
10. Select from a list ways to avoid losing money to a short-change artist.
11. Name the methods of money manipulation.
12. Discuss how to protect against money manipulators.
13. Discuss how to detect counterfeit bills.
14. Discuss how to report counterfeit money.

15. Select from a list those things that should be done if you are a victim of robbery.

16. Discuss with your employer the training station's policy on accepting checks and writing sales tickets.

17. Demonstrate the ability to operate a credit card machine.

HANDLING MONEY
UNIT II

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

   A. Provide student with objective sheet.

   B. Give pretest using objective sheet.

   C. Discuss unit and specific objectives.

   D. Provide student with information and assignment sheets.

   E. Discuss information and assignment sheets.

   F. Provide students with play money to role play counting change.

   G. Provide sales tickets for students to role play writing sales tickets.

   H. Provide student with copies of the local tax table if different from those provided in the unit.

   I. Provide *Know Your Money* for examples of counterfeit money.

   J. Invite guest speakers from the Federal Bureau of Investigation and/or local banks.

   K. Provide a credit card machine, credit card, and credit card forms from local merchants.

   L. Order films.

   M. Give test.

   N. Reteach if necessary.

   O. Teach again until minimum standard is reached.

II. Student:

   A. Read objective sheet.

   B. Study information sheet.

   C. Take notes.

   D. Complete assignment sheets.

   E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Assignment sheets

      1. Assignment Sheet #1--Counting Change

      2. Assignment Sheet #2--Figuring Sales Tax

      3. Assignment Sheet #3--Accepting Checks

      4. Assignment Sheet #4--Writing Sales Tickets

      5. Assignment Sheet #5--Discussing Training Station Policy

   D. Answers to assignment sheets

   E. Job Sheet #1--Operate Credit Card Machine

   F. Test

   G. Answers to test

II. References:

   A. Kolodny, Leonard. *Outwitting Bad Check-Passers.* Small Business Administration, Small Marketers Aids, No. 137, Washington D. C., 1971.

   B. Hawley, Dean. *Store Security: Check Cashing Procedures and Cash Handling Control.* The Distributive Education Materials Laboratory; 1885 Neil Avenue (115 Townshend Hall); Columbus, Ohio 43210.

   C. *Know Your Money.* Washington, D.C.: U. S. Government Printing Office, 1968.

   D. *Supermarket Checker Education.* Dayton, Ohio: National Cash Register, 1968.

   E. Sparks, Mavis C. *Checker, Cash Clerk and Cashier Training.* Lexington: University of Kentucky, Instructional Materials Laboratory, 1969.

   F. Everhardt, Richard. *Cash or Charge.* The Distributive Education Materials Laboratory; 1885 Neil Avenue (115 Townshend Hall); Columbus, Ohio 43210.

III. Films:

(NOTE: Oklahoma teachers may order films and filmstrips from the State Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth Avenue, Stillwater, Oklahoma 74074. Out-of-state teachers may purchase films from the addresses listed below.)

A. "Handling Money." Available from National Education Media; 15250 Ventura Boulevard; Sherman Oaks, California 91403.

B. "Handling Checks." Available from National Education Media; 15250 Ventura Boulevard; Sherman Oaks, California 91403.

C. "Handling Credit Cards." Available from National Education Media; 15250 Ventura Boulevard; Sherman Oaks, California 91403.

HANDLING MONEY
UNIT II

INFORMATION SHEET

I. Terms and definitions

A. Post-dating--Dating a check for a date later than when the check is written

Example: If a check is dated October 1 on September 1, it cannot be cashed until October 1

B. Endorsement--Signature placed on the back of a check by the person cashing it

C. Two-party check--Endorsing a check and passing it along to another party

Example: Businesses are often hesitant to accept two-party checks. Although they may know the person trying to cash the check, they may not know the person who originally wrote the check

D. Money order--Order issued by a post office, bank, or telegraph office for payment of money at another office

E. Multiple pricing--Pricing merchandise in terms of quantities of more than one unit

F. Denominations--Way money is broken down into different values and sizes

Example: One dollar bills are a denomination and five dollar bills are another denomination

G. Traveler's check--Check guaranteed by deposits [illegible] the bank which issues the check; may be replaced if lost or stolen; must be signed at the bank and again in the presence of the person cashing the check

II. Counting change (Assignment Sheet #1)

A. Without an automatic change dispenser

1. Place the money received on the coin slab while making change

INFORMATION SHEET

2. Make change with the least number of coins and bills

   Example: Instead of two dimes and a nickel, give the customer a quarter; instead of seven ones, give the customer a five dollar bill and a two dollar bill or a five dollar bill and two ones. However, you would use smaller coins or bills if you are out of the larger denominations

3. Repeat the amount of the sale and the amount of money received by the customer

4. Count the money to yourself as it is taken from the cash drawer and then again back to the customer

5. Do not add or subtract, simply begin with the smallest amount and count back to the amount given by the customer

   Example: If the customer owes $2.87 and gives you a ten dollar bill you would say, "That will be two eighty-seven out of ten. Two eighty-seven, two eighty-eight, two eighty-nine, two ninety, three dollars, four, five, and five dollars makes ten. Okay? Thank you."

6. Mention each new dollar denomination throughout to avoid making mistakes

   Example: "That will be two eighty-seven out of ten. Two eighty-seven, two eighty-eight, two eighty-nine, two ninety, three dollars, four, five, and five dollars makes ten. Correct? Thank you."

7. Count each coin and bill separately

   Example: Do not lump all pennies together but count each one separately. Lumping change together does not save time because most customers will take time to count the change anyway

8. Subtract any additional change given by the customer and begin counting back from that amount

   Example: If the customer owes $2.87 and gives you $5.87, you would count back by saying, "Two dollars, three, four, and five dollars." If the customer owes $2.35 and gives you $5.50, you would reply, "Thirty-five cents out of fifty cents--thirty-five, forty-five, fifty, and two dollars out of five--two dollars, three, four, and five dollars. Right? Thank you."

INFORMATION SHEET

9. Start over if interrupted or politely ask the customer to wait until the transaction is completed

10. Count the change directly into the customer's hand whenever possible

11. Never argue or accuse a customer of cheating

12. Cash checks for other than the exact amount before receiving payment for goods and services

B. With an automatic change dispenser

1. Record both the amount of the sale and the amount received on the cash register or change-making machine

2. Repeat the amount of the purchase and the amount of money received when the money is placed on the coin slab and again as the amount of money received is punched into the machine

   Example: "$21.50 out of $30.00"

3. State the amount of change when the amount is indicated on the machine

   Example: "Your correct change is $8.50"

4. Take the number of bills and then the amount of change from the cash drawer

   (NOTE: Some machines dispense the coins automatically. Thus, the customer picks up his/her coins without having them counted back. The cashier should remind the customer to pick up his/her change.)

5. Count the change to the customer starting with the largest bills and ending with the smallest coins

   Example: "Your change will be $8.50. Five dollars, six, seven, and eight dollars. And your change is in the dispenser. Correct? Thank you."

   (NOTE: The last two steps are the opposite of counting change without an automatic dispenser.)

INFORMATION SHEET

III. Sales tax tables (Assignment Sheet #2)

(NOTE: Some stores may provide a tax table to help figure tax quickly and accurately.)

A. Two percent tax table

Amount of Coins	Tax
$ .00 - $ .48	$ .00
$ .49 - $ .74	$ .01
$ .75 - $ .99	$ .02

B. Three percent tax table

Amount of Coins	Tax
$ .00 - $ .14	$ .00
$ .15 - $ .44	$ .01
$ .45 - $ .74	$ .02
$ .75 - $ .99	$ .03

C. Four percent tax table

Amount of Coins	Tax
$ .00 - $ .14	$ .00
$ .15 - $ .39	$ .01
$ .40 - $ .64	$ .02
$ .65 - $ .89	$ .03
$ .90 - $ .99	$ .04

IV. Checks (Assignment Sheet #3)

A. Notice the date on the check

1. Post-dated checks may not be cashed until that date arrives

2. Many businesses will not accept checks over thirty days old

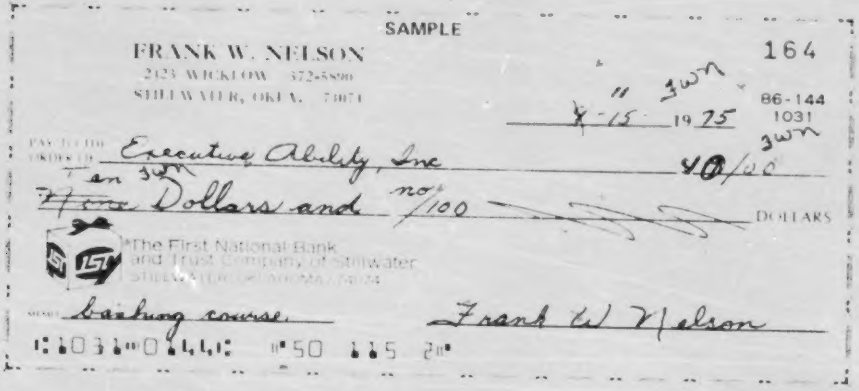
B. Notice if the amount is written clearly in numbers and in words--If the amount written in words is different from the amount written in numbers, the bank will cash the amount written in words

(NOTE: Not being able to read a person's handwriting is a problem, but it is only an error if it appears to be done on purpose.)

INFORMATION SHEET

C. Have the customer initial any corrections on the dates or amounts

Example:



SAMPLE

FRANK W. NELSON
2123 WICKLOW 372-5890
STILLWATER, OKLA. 74074

164

11 3WN
~~X~~-15 19 75

86-144
1031

PAY TO THE ORDER OF Executive Ability, Inc 10/00 3WN

Ten 3WN
~~Four~~ Dollars and no/100 DOLLARS

The First National Bank
and Trust Company of Stillwater
STILLWATER, OKLAHOMA 74074

MEMO banking course.

Frank W Nelson

⑆1031⑈0144⑆ ⑈50 115 2⑈

D. Write in customer's address if only a post office box number is printed on the check face

E. Observe store rules on getting checks approved, limits on the amount of the check, and on accepting two-party, out-of-town, or company payroll checks

F. Ask for proper identification courteously

(NOTE: Some businesses require more than one form of identification or a particular kind of identification. Some may require that the driver's license number be written on the check, that a picture be taken of the check signer, or that a thumb print be placed on the back of the check. In some cases, it may be necessary to call the bank to verify a check.)

G. Examine signature on check

1. Make sure the signature on the identification matches the signature on the check

2. Make sure the signature is the same as the name printed on the check

H. Do not accept checks which are written in pencil

I. Do not accept checks marked "For Deposit Only"

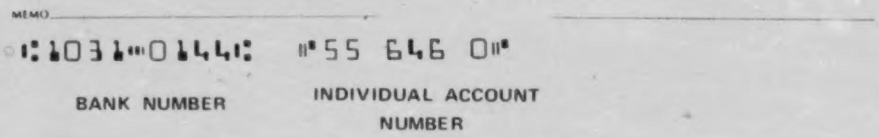
(NOTE: These checks may only be deposited in the bank.)

INFORMATION SHEET

J. Do not accept company checks with the company name typed on the face of the check rather than printed on the face of the check

K. Do not accept checks without an account number or with altered account numbers

Example:



L. Varify with your supervisor all questionable checks

V. Credit cards

(NOTE: Stores using computer terminals can authorize credit cards by just punching in the credit card number and amount.)

A. Make sure the card is one your business accepts

B. Notice the expiration date

(NOTE: Some cards print the date the card was issued instead of the expiration date. Therefore, it is important to know for what period of time the cards are issued.)

C. Make sure the signature on the receipt matches the signature on the card

(NOTE: Have the customer sign the credit card and compare the signature with another form of identification if the credit card has not already been signed.)

D. Check the credit card number with the warning list of bad, lost, or stolen cards

(NOTE: This can be done easily by matching the last three numbers on the list and the card. The numbers on the list are in order.)

E. Contact the credit card company for authorization if any suspicion arises

Example: Customer who will not sign the receipt because of an injured arm

F. Hold the card, stall the customer, and contact the manager if you discover a stolen card

(NOTE: If the customer leaves, remember to get a good description.)

G. Write in credit card numbers which do not print clearly when the card is put through the machine

INFORMATION SHEET

VI. Money orders

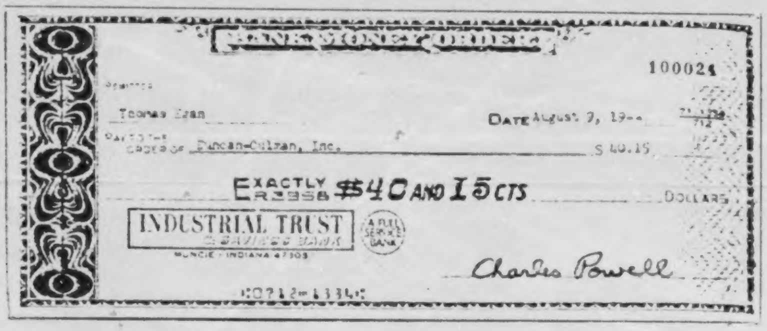
A. Do not accept checks in payment for money orders

(NOTE: Money orders are made to send through the mail. If the purchaser has a valid checking account, he does not need a money order because he can send a check in the mail. However, there may be a few exceptions where a check may not be accepted as legal payment.)

B. Do not cash if the amount has been altered, erased, or if the amount is in excess of the printed limit

(NOTE: Money orders usually are not written for over $100.)

C. Notice the dates and signatures as on a regular check



100024

Thomas Egan

DATE August 9, 19--

PAY TO THE ORDER OF Duncan-Culzan, Inc. $ 40.15

EXACTLY $40 AND 15 CTS DOLLARS

INDUSTRIAL TRUST & SAVINGS BANK

MUNCIE • INDIANA 47305

A FULL SERVICE BANK

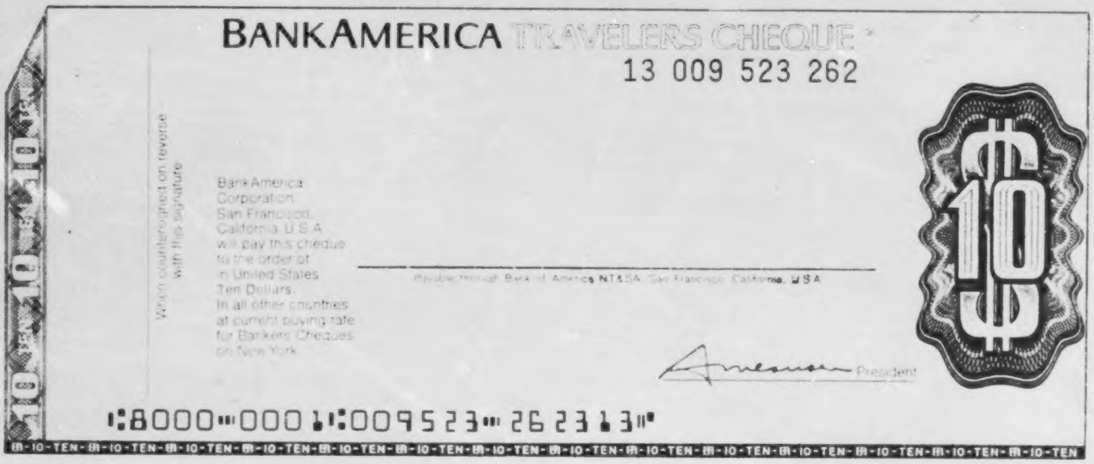
Charles Powell

VII. Traveler's checks

A. Have customer sign check in the presence of the person cashing it

B. Compare the customer's signature with the signature on the front of the check made at the time the checks were purchased at the bank

C. Have the customer sign the check again if it has already been endorsed without seeing him/her sign it



BANKAMERICA TRAVELERS CHEQUE

13 009 523 262

When countersigned on reverse with this signature

BankAmerica Corporation
San Francisco,
California, U.S.A.
will pay this cheque
to the order of
in United States
Ten Dollars.
In all other countries
at current buying rate
for Bankers Cheques
on New York

Payable through Bank of America NT&SA San Francisco, California, U.S.A.

President

⑆8000⑈0001⑆009523⑈262313⑈

INFORMATION SHEET

VIII. Reasons for writing sales tickets correctly

- A. Gives a good impression of the business
- B. Builds confidence in the salesperson
- C. Makes recordkeeping easier and more accurate
- D. Aids in making refunds and exchanges
- E. Reduces arguments and misunderstandings with customers
- F. Prevents shoplifting and ticket alteration

IX. Procedures for writing sales tickets (Assignment Sheet #4)

- A. Write firmly enough for information to transfer clearly on the carbon copy

  (NOTE: Use a soft lead pencil if the business prefers that pencils be used.)
- B. Make sure abbreviations are clearly understood
- C. Include the date, salesperson's number or initials, and department numbers or letters where applicable
- D. List the price of a single item if more than one of the same kind of item is purchased

  Example: Purchase of three doughnuts priced at $ .25 each

Quantity	Description	$	c
3	Doughnuts @ .25		75
1	Choc Cake	2	75
		3	50

- E. List the price of items sold in quantities

  Example: Purchase of three pairs of socks priced at 3 pair for $2.00, two t-shirts which come in a package of three t-shirts for $6.60, and four briefs which come in a package of three briefs for $6.60.

Quantity	Description	$	c
3	Socks 3/2.00	2	00
2	T-shirts 3/6.60	4	40
4	Briefs 3/6.60	8	80
		15	20

INFORMATION SHEET

F. Total the purchases directly under the list of prices, even if it can be added in your head, to prevent anyone from altering the ticket at a later time

G. Repeat and/or spell the names and addresses on charge, layaway, and approval tickets or delivery information

H. Destroy any tickets or receipts left lying on the floor or counter for a neater appearance and shoplifting reduction

I. Have corrections in quantity and amount columns approved by the supervisor

X. Short-change artists

(NOTE: The short-change artist interrupts while the salesperson is making change, wants change back a different way than normal, rushes the salesperson, wants to buy something else, or wants to exchange the item being purchased.)

A. Ask a customer to wait and then finish the present transaction to avoid being interrupted and confused

Example: "Certainly I will give you change, just a moment please."

B. Do not argue with a customer

C. Have the customer's money in your hand before giving any change regardless of how many times change is asked for by the customer

D. Always call out loud the size of the bill given by the customer

E. Close the cash drawer and contact the supervisor if total confusion occurs

XI. Money manipulation

A. Split bills

Example: A $10 bill and a $1 bill may be peeled apart by a special process, the sides interchanged, and joined back together with the wrong sides back to back. The result would be two bills, each having a ten side and a one side. The manipulator may then pass the two altered bills for $20 worth of merchandise and change from the original eleven dollars. Another method is to cut bills in half and attach the right half of a large bill to the left half of a small bill and pass them with several large bills folded together

INFORMATION SHEET

B. Marked bills

Example: A manipulator may buy something inexpensive with a $10 bill which is marked with a red "X" in the corner, receive his change, and leave. His partner then comes along, buys something inexpensive with a one dollar bill, argues that he gave the salesperson a $10 bill, and claims he can prove it because he remembers that the bill has a mark on it. The salesperson looks in the cash drawer, finds the marked $10 bill, and gives the second manipulator $9 more in change

XII. How to protect against money manipulators

A. Examine both sides of bills

B. Look for markings

C. Casually or humorously let the customer know that you noticed any markings

Example: "It looks like someone has been doodling on this bill"

D. Do not put money into the cash drawer until the customer has acknowledged receiving the correct change

E. Place marked bills under the cash drawer

XIII. How to detect counterfeit bills

A. Suspected bill should be compared with another bill of the same denomination

B. Hair outlines on counterfeit bills may blend into the background rather than being distinct

C. Points around the colored seal may not be even, clear, and sharp on counterfeit bills

D. Crisscross lines on the border may not be clear and distinct

E. Serial numbers may be out of line, poorly spaced, printed too light or too dark, or the prefix letter of the serial number may not agree with the district letter in the seal

XIV. How to report counterfeit money

A. Inform your supervisor first

B. Write your name and date on the back of the bill for later identification

C. Write down any details you can remember about how you got it, who gave it to you, where you got it, and when you got it

D. Contact the police, U.S. Secret Service, commercial bank, or Federal Reserve bank

INFORMATION SHEET

E. Do not return the money to the customer if the bills are discovered to be counterfeit

F. Stall the person passing the bills

G. Avoid arguments because the passer may also be an innocent victim

H. Write down the passer's description and license number if he/she leaves

XV. Robberies

A. Watch for strange cars near the front or rear entrance, particularly with the motor running or a driver slumped over the steering wheel

B. Check all washrooms and dressing rooms before closing

C. Do what the robber says without arguing

(NOTE: Do not try to be a hero.)

D. Concentrate on the robber's description

Example: Age; nationality; height; weight; build; complexion; eye and hair color; clothing; right or left handedness; voice characteristics, such as high, low, rapid, slow, lisp, accent; physical characteristics, such as tatoos, scars, limp; type of weapon

E. Do not touch anything the robber may have touched

F. Get the license number and a description of the getaway car if possible

G. Call the police

H. Write down descriptions of the suspects, weapons, and car

I. Get the names of customers and other witnesses and have them write down their descriptions

J. Do not discuss the crime with anyone until getting permission from the police

HANDLING MONEY
UNIT II

ASSIGNMENT SHEET #1--COUNTING CHANGE

Use the fewest number of coins and bills and record the correct amount of change for each sale listed.

Example:

NAME

Sales No.	Amount of sale	Amount Rec'd	COINS					BILLS		
			1¢	5¢	10¢	25¢	50¢	$1	$5	$10
A	$ 1.98	$ 5.00	2					3		

Sales No.	Amount of sale	Amount Rec'd	COINS					BILLS		
			1¢	5¢	10¢	25¢	50¢	$1	$5	$10
1	$ 2.33	$ 3.00								
2	$ 7.88	$20.00								
3	$ 3.07	$10.00								
4	$ 3.00	$ 5.00								
5	$ 7.14	$20.00								
6	$ 8.12	$10.00								
7	$ .78	$10.00								
8	$12.40	$15.00								
9	$ 9.15	$20.15								
10	$ 4.31	$ 5.50								

HANDLING MONEY
UNIT II

ASSIGNMENT SHEET #2--FIGURING SALES TAX

1. Memorize the tax table for your area

   (NOTE: Some locations may not have a sales tax and some products or industries may have a special tax.)

2. Figure tax on the dollar amount of the purchase first

3. Use the tax table to figure the tax on the coins

4. Add the tax on the bills and the tax on the coins together for the total tax

5. Add the total tax to the amount of purchase

   Example: Purchase of $3.50 with a 4% or 4¢ on the dollar tax

   $$\begin{array}{r} \$3.00 \\ \times\ .04 \\ \hline .1200 \end{array} \qquad \begin{array}{l} .50 = .02 \text{ tax} \\ \text{(see tax table)} \end{array} \qquad \begin{array}{rl} .12 & \text{(Tax on \$3.00)} \\ +\ .02 & \text{(Tax on \$.50)} \\ \hline .14 & \text{Total Tax} \end{array}$$

   $$\begin{array}{rl} \$3.50 & \text{Purchase} \\ +\ .14 & \text{Tax} \\ \hline \$3.64 & \text{Total} \end{array}$$

6. Figure sales tax for the following purchases using the tax table for your area

   a. .49

   b. $2.98

   c. .35

   d. .66

   e. $3.98

   f. .99

   g. $4.95

   h. $10.47

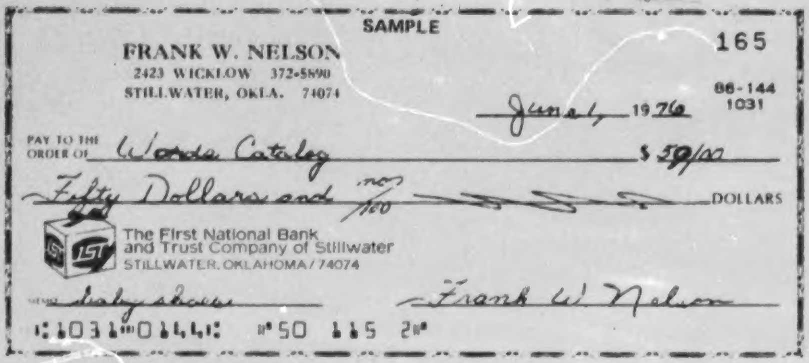
   i. $5.75

   j. $5.63

HANDLING MONEY
UNIT II

ASSIGNMENT SHEET #3--ACCEPTING CHECKS

Under each of the following checks, list all the errors you can find. The checks were received on July 2. 1976. After you have examined checks for errors, it should only take the experienced employee about 10 seconds to look over a check.



SAMPLE

165

FRANK W. NELSON
2423 WICKLOW 372-5890
STILLWATER, OKLA. 74074

86-144
1031

June 2, 19 76

PAY TO THE ORDER OF Wards Catalog $ 50/00

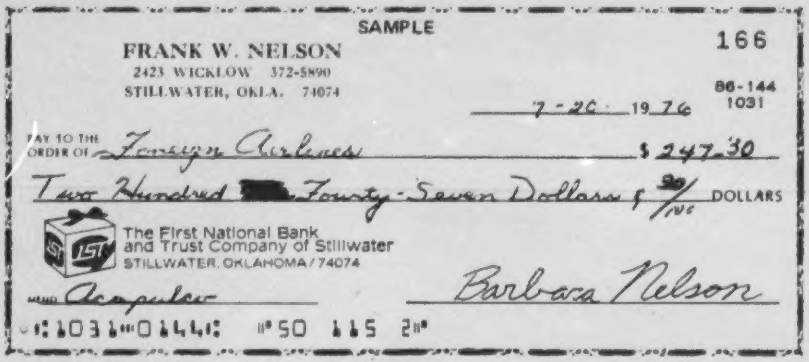
Fifty Dollars and no/100 DOLLARS

The First National Bank
and Trust Company of Stillwater
STILLWATER, OKLAHOMA / 74074

MEMO baby shower

Frank W Nelson

⑆1031⑈0144⑆ ⑈50 115 2⑈



SAMPLE

166

FRANK W. NELSON
2423 WICKLOW 372-5890
STILLWATER, OKLA. 74074

86-144
1031

7-20- 19 76

PAY TO THE ORDER OF Foreign Airlines $ 247.30

Two Hundred [redacted] Fourty-Seven Dollars & 90/100 DOLLARS

The First National Bank
and Trust Company of Stillwater
STILLWATER, OKLAHOMA / 74074

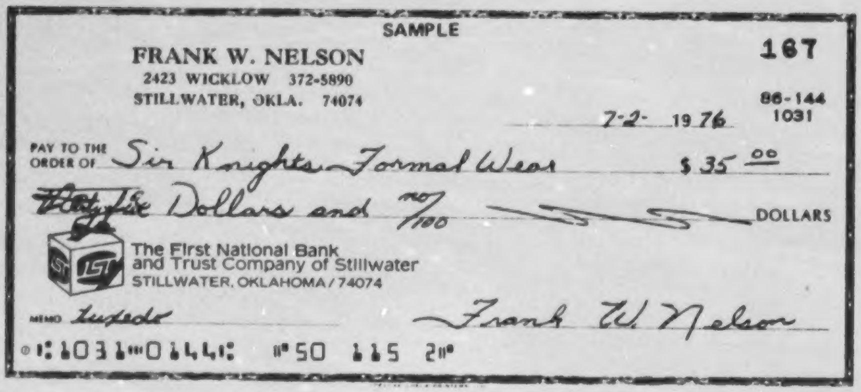
MEMO Acapulco

Barbara Nelson

⑆1031⑈0144⑆ ⑈50 115 2⑈

74-8

ASSIGNMENT #3



SAMPLE

FRANK W. NELSON
2423 WICKLOW 372-5890
STILLWATER, OKLA. 74074

167

86-144
1031

7-2- 19 76

PAY TO THE ORDER OF Sir Knights Formal Wear $ 35 00

Thirty-five Dollars and no/100 DOLLARS

The First National Bank
and Trust Company of Stillwater
STILLWATER, OKLAHOMA / 74074

MEMO tuxedo

Frank W. Nelson

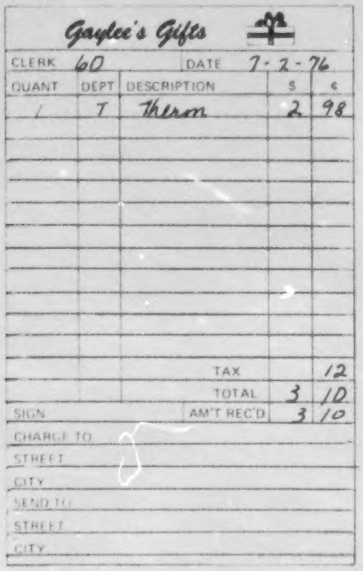
⑆1031⑈0144⑆ ⑈50 115 2⑈

HANDLING MONEY
UNIT II

ASSIGNMENT SHEET #4--WRITING SALES TICKETS

1. Under each of the following sales tickets list all the mistakes you can find. Notice that some tickets repeat information because part of the ticket may be torn off for recordkeeping or delivery information. The 4% sales tax table is used.

(a).



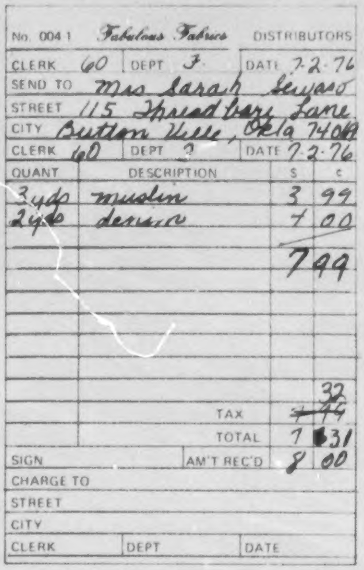
Gaylee's Gifts

CLERK 60 DATE 7-2-76

QUANT	DEPT	DESCRIPTION	$	¢
1	T	Theron	2	98
		TAX		12
		TOTAL	3	10

SIGN AM'T REC'D 3 10
CHARGE TO
STREET
CITY
SEND TO
STREET
CITY

(b).



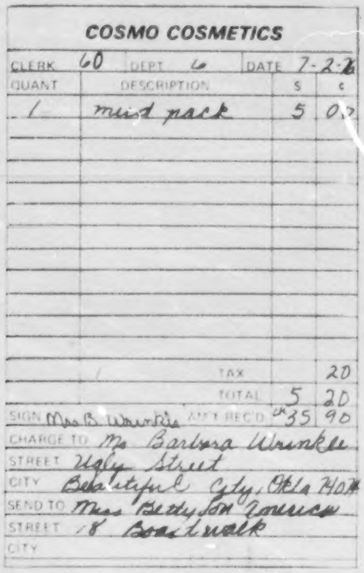
No. 0041 *Fabulous Fabrics* DISTRIBUTORS

CLERK 60 DEPT 3 DATE 7-2-76
SEND TO Mrs Sarah Sewyaso
STREET 115 Threadbare Lane
CITY Button Ville, Okla 740[illegible]
CLERK 60 DEPT 3 DATE 7-2-76

QUANT	DESCRIPTION	$	¢
3yds	muslin	3	99
2yds	denim	4	00
		7	99
	TAX	~~1~~	32 ~~44~~
	TOTAL	7	31

SIGN AM'T REC'D 8 00
CHARGE TO
STREET
CITY
CLERK DEPT DATE

(c).



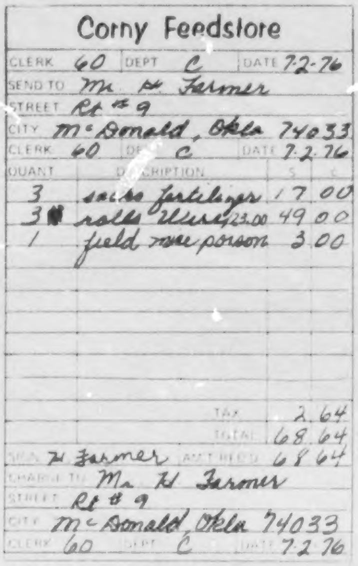
COSMO COSMETICS

CLERK 60 DEPT 6 DATE 7-2-76

QUANT	DESCRIPTION	$	¢
1	mud pack	5	00
	TAX		20
	TOTAL	5	20

SIGN Mrs B. Wrinkle AM'T REC'D ck 35 90
CHARGE TO Ms Barbara Wrinkle
STREET Ugly Street
CITY Beautiful City, Okla 740[illegible]
SEND TO Miss Betty Sox America
STREET 18 Boardwalk
CITY

(d).



Corny Feedstore

CLERK 60 DEPT C DATE 7-2-76
SEND TO Mr H Farmer
STREET Rt #9
CITY McDonald, Okla 74033
CLERK 60 DEPT C DATE 7-2-76

QUANT	DESCRIPTION	$	¢
3	sacks fertilizer	17	00
3	rolls wire 23.00	49	00
1	field mice poison	3	00
	TAX	2	64
	TOTAL	68	64

SIGN H Farmer AM'T REC'D 68 64
CHARGE TO Mr H Farmer
STREET Rt #9
CITY McDonald, Okla 74033
CLERK 60 DEPT C DATE 7-2-76

ASSIGNMENT SHEET #4

2. Fill out the sample sales tickets for the following situations. Use the sales tax table for your area and the current date. Your salesperson number is 60.

   a. Wilda Wedlock bought the following items: one wedding dress, $232.00; one pair satin slippers, $20.00; one veil and hat, $40.00; three bridesmaids' dresses, $36.00 per dress; three compacts, $3.98 per compact; one blue garter, $1.98; two champagne glasses, $3.95 per glass; one cake knife, $7.95; and one guest book, $20.00. All of these items are to be delivered to the First United Methodist Church, Wesley Boulevard, Belltower, Oklahoma 73044. Wilda gave the salesperson correct change.

CLERK		DATE		
QUANT	DEPT	DESCRIPTION	$	¢
		TAX		
		TOTAL		
SIGN		AM'T REC'D		
CHARGE TO				
STREET				
CITY				
SEND TO				
STREET				
CITY				

ASSIGNMENT SHEET #4

b. Wilda Wedlock charged the following items: two baskets of carnations and gladiolas, $50 a basket; three nosegays, $25 each; five corsages, $2.50 each; and eight boutonnieres, $.75 each. Wilda's address is 24 Luver Lane, Belltower, Oklahoma 73044.

CLERK		DATE		
QUANT	DEPT	DESCRIPTION	$	¢
		TAX		
		TOTAL		
SIGN		AM'T REC'D		
CHARGE TO				
STREET				
CITY				
SEND TO				
STREET				
CITY				

HANDLING MONEY
UNIT II

ASSIGNMENT SHEET #5--DISCUSSING TRAINING STATION POLICY

Ask your training station sponsor to clarify your businesses' policies regarding sales tickets and/or accepting checks. Have the sponsor sign the sheet and then report the policies to the class on the following class period.

1. Cashing checks without a purchase being made
2. Cashing checks for other than the amount of purchase
3. Adequate identification for cashing a check
4. Store rules concerning limits on the amount a check may be written for and policies on out-of-town, government, and payroll checks
5. Whether to use an ink pen or pencil when writing sales tickets
6. Whether to print or write sales tickets
7. Whether to keep the original or duplicate copy of a sales ticket
8. How to void a ticket
9. Special procedures for correcting mistakes on sales tickets
10. Any special procedures for adding items to a ticket after it has been totaled
11. Any special procedures if more than one ticket is needed to record a purchase
12. Any other check and/or sales ticket policies

____
Supervisor/manager

HANDLING MONEY
UNIT II

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

Sales No.	Amount of sale	Amount Rec'd	COINS						BILLS	
			1¢	5¢	10¢	25¢	50¢	$1	$5	$10
1	$ 2.33	$ 3.00	2	1	1		1			
2	$ 7.88	$ 20.00	2		1			2		1
3	$ 3.07	$ 10.00	3	1	1	1	1	1	1	
4	$ 3.00	$ 5.00						2		
5	$ 7.14	$ 20.00	1		1	1	1	2		1
6	$ 8.12	$ 10.00	3		1	1	1	1		
7	$ .78	$ 10.00	2		2			4	1	
8	$ 12.40	$ 15.00			1		1	2		
9	$ 9.15	$ 20.15						1		1
10	$ 4.31	$ 5.50	4	1	1			1		

Assignment Sheet #2

Answers will vary with local tax tables

Assignment Sheet #3

1. a. Many businesses will not accept checks over thirty days old
   b. Corrections without the initials of the person writing the check
   c. Number amount and written amount are different
2. a. Post-dated checks may not be cashed until that date arrives
   b. Corrections without the initials of the person writing the check
   c. Signature is not the same as the name printed on the check
3. Written amount is not clear, but otherwise the check is correct

Assignment Sheet #4

1. a. Abbreviation could mean several things
   b. 1) Corrections may need to be approved by the supervisor
      2) Price per yard is not shown
      3) Total is not correct
   c. No serious errors
   d. 1) Price of single unit is not shown
      2) Subtotal was not made directly under the last item
      3) Total is incorrect (Wire should cost $69.00.)
2. Answered to satisfaction of teacher-coordinator

Assignment Sheet #5

Evaluated to the satisfaction of teacher-coordinator

HANDLING MONEY
UNIT II

JOB SHEET #1--OPERATE CREDIT CARD MACHINE

I. Materials

  A. Credit card machine

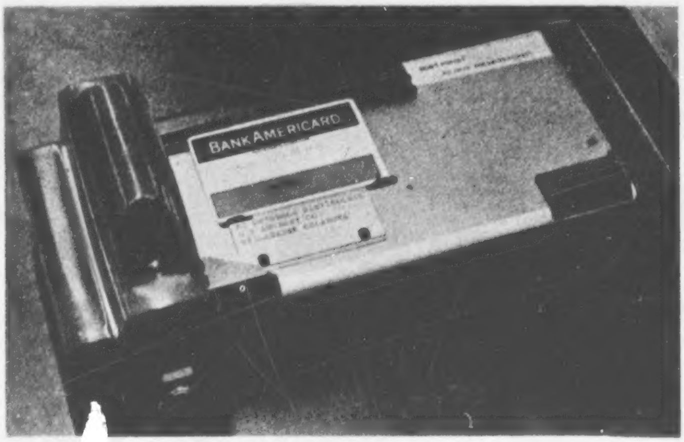
  B. Credit card

  C. Credit card forms

II. Procedure

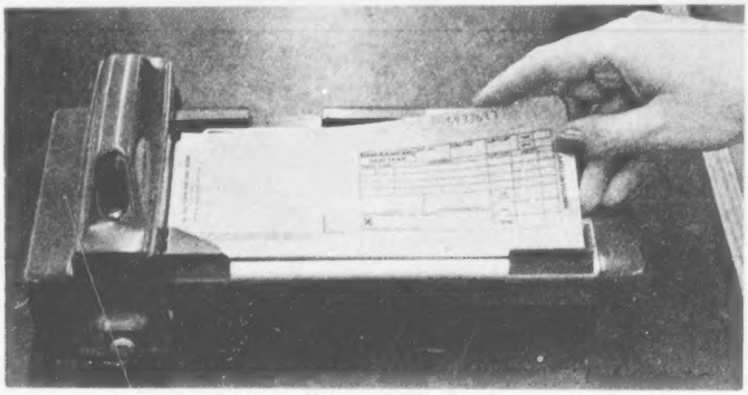
  A. Place the credit card face up in the slots on the machine (Figure 1)

FIGURE 1



  B. Place the credit card form face up in the slots on the machine and over the face of the credit card (Figure 2)

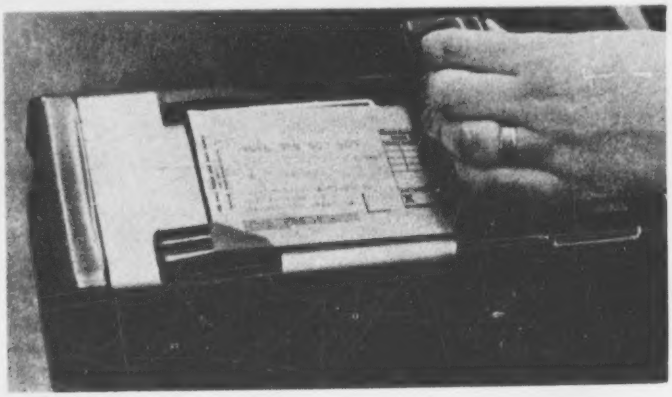
FIGURE 2



JOB SHEET #1

C. Pull the handle of the machine over the card and form and then back to the starting position (Figure 3)

FIGURE 3

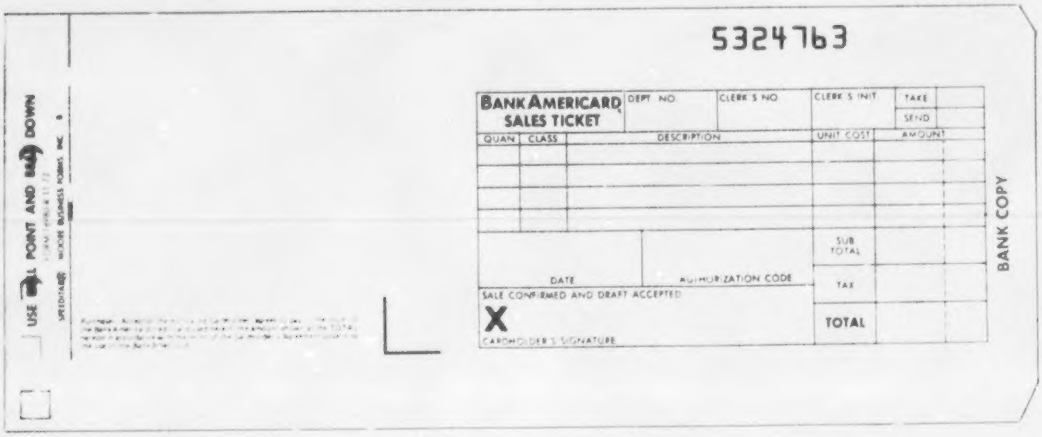


D. Remove the card and form from the machine

E. Fill out the credit card form for the following situation (Figure 4)

> Sally Sue purchased one 8 x 10 photograph for $16.00 and one frame for $7.50 from department 30, clerk number 60. The items will be mailed. Use the current date and local sales tax table.

FIGURE 4



USE BALL POINT AND BEAR DOWN

5324763

BANKAMERICARD SALES TICKET

DEPT NO	CLERK'S NO	CLERK'S INIT	TAKE	
			SEND	

QUAN	CLASS	DESCRIPTION	UNIT COST	AMOUNT

DATE	AUTHORIZATION CODE	SUB TOTAL	
		TAX	
SALE CONFIRMED AND DRAFT ACCEPTED X CARDHOLDER'S SIGNATURE		**TOTAL**	

BANK COPY

F. Ask the customer to sign the form and return the card to the owner

G. Give the customer his/her copy and keep the merchant and bank copies (carbon copies)

HANDLING MONEY
UNIT II

TEST

1. Match the terms on the right to the correct definitions on the left by placing the appropriate numbers in the blanks provided.

_____a. Endorsing a check and passing it along to another party

_____b. Pricing merchandise in terms of quantities of more than one unit

_____c. Check guaranteed by deposits at the bank which issues the check; may be replaced if lost or stolen; must be signed at the bank and again in the presence of the person cashing the check

_____d. Dating a check for a date later than when the check is written

_____e. Signature placed on the back of a check by the person cashing it

_____f. Way money is broken down into different values and sizes

_____g. Order issued by a post office, bank, or telegraph office for payment of money at another office

1. Post-dating
2. Endorsement
3. Two-party check
4. Money order
5. Multiple pricing
6. Denominations
7. Traveler's check

2. Distinguish between those steps taken when counting change with an automatic change dispenser and when counting change without an automatic change dispenser. Place an "X" in front of the steps used with a change dispenser and an "O" in front of those without an automatic dispenser.

_____a. Take the number of bills and then the amount of change from the cash drawer

_____b. Count the change to the customer starting with the largest bills and ending with the smallest coins ______c. Do not add or subtract, simply begin with the smallest amount and count back to the amount given by the customer

______d. Record both the amount of the sale and the amount received on the cash register or change-making machine

3. Write the two, three, and four percent sales tax tables.

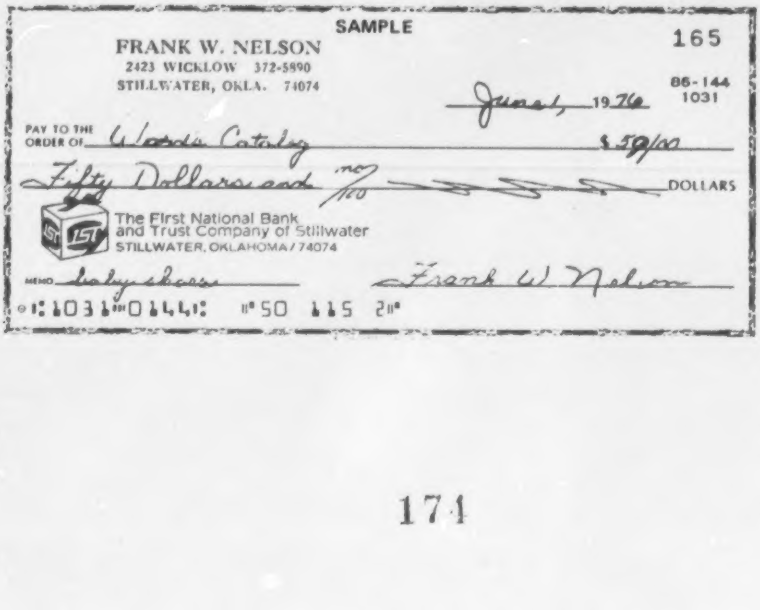
(NOTE: Write the tax table for your area if different from those provided in the information sheet.)

4. Select the errors on the following check if it was received on April 1, 1976.

a.

b.

c.



SAMPLE

FRANK W. NELSON
2423 WICKLOW 372-5890
STILLWATER, OKLA. 74074

165

86-144
1031

June 1, 19 76

PAY TO THE ORDER OF Wards Catalog $ 50/00

Fifty Dollars and no/100 DOLLARS

The First National Bank
and Trust Company of Stillwater
STILLWATER, OKLAHOMA / 74074

MEMO baby shoes

Frank W. Nelson

:1031:0144: "50 115 2"

5. Discuss what to look for when accepting credit cards.

6. Discuss what to look for when accepting money orders.

7. Discuss what to look for when accepting traveler's checks.

8. Select from the list below the reasons for writing sales tickets correctly. Place an "X" in the correct blanks.

_____a. Gives a good impression of the business

_____b. Builds confidence in the salesperson

_____c. Makes recordkeeping easier and more accurate

_____d. Aids in making refunds and exchanges

_____e. Reduces arguments and misunderstandings with customers

_____f. Takes too much time

_____g. Prevents shoplifting and ticket alteration

9. Write a sales ticket for the following situation. Use the sales tax table for your area and the current date. Your salesperson number is 60.

   Gary Bird just bought the following items: three tropical fish, $1.98 per fish, department F; one box of fish food, $ .59, department E; and one complete aquarium, $20.95, department H. Gary gave the salesperson $30.00.

CLERK			DATE	
QUANT	DEPT	DESCRIPTION	$	¢
		TAX		
		TOTAL		
SIGN		AM'T REC'D		
CHARGE TO				
STREET				
CITY				
SEND TO				
STREET				
CITY				

10. Select from the list below ways to avoid losing money to a short-change artist. Place an "X" in the correct blanks.

_____a. Ask a customer to wait and then finish the present transaction to avoid being interrupted and confused

_____b. Do not argue with a customer

_____c. Close the cash drawer and contact the supervisor if total confusion occurs

_____d. Have the customer's money in your hand before giving any change regardless of how many times change is asked for by the customer

_____e. Always call out loud the size of the bill given by the customer

11. Name the methods of money manipulation.

a.

b.

12. Discuss how to protect against money manipulators.

13. Discuss how to detect counterfeit bills.

14. Discuss how to report conterfeit money.

15. Select from the list below those things that should be done if you are a victim of a robbery. Place an "X" in the correct blanks.

_____a. Watch for strange cars near the front or rear entrance, particularly with the motor running or a driver slumped over the steering wheel

_____b. Check all washrooms and dressing rooms before closing

_____c. Do not cooperate with the robber _____d. Concentrate on the robber's description

_____e. Try to distract the robber and grab the weapon

_____f. Yell for the manager

_____g. Chase the robber

_____h. Do not touch anything the robber may have touched

_____i. Get the license number and a description of the getaway car if possible

_____j. Call the police

_____k. Write down descriptions of the suspects, weapons, and car

_____l. Get the names of customers and other witnesses and have them write down their descriptions

_____m. Do not discuss the crime with anyone until getting permission from the police

16. Discuss with your employer the training station's policy on accepting checks and writing sales tickets.

17. Demonstrate the ability to operate a credit card machine.

(NOTE: If activities 16 and 17 have not been accomplished prior to the test, ask your instructor when they should be completed.)

HANDLING MONEY
UNIT II

ANSWERS TO TEST

1. a. 3
   b. 5
   c. 7
   d. 1
   e. 2
   f. 6
   g. 4

2. a. X
   b. X
   c. O
   d. X

3. (NOTE: Answer may vary according to local area.)

   a. Two percent tax table

Amount of Coins	Tax
$ .00 - $ .48	$ .00
$ .49 - $ .74	$ .01
$ .75 - $ .99	$ .02

   b. Three percent tax table

Amount of Coins	Tax
$ .00 - $ .14	$ .00
$ .15 - $ .44	$ .01
$ .45 - $ .74	$ .02
$ .75 - $ .99	$ .03

   c. Four percent tax table

Amount of Coins	Tax
$ .00 - $ .14	$ .00
$ .15 - $ .39	$ .01
$ .40 - $ .64	$ .02
$ .65 - $ 89	$ .03
$ .90 - $ .99	$ .04

4. a. Post-dated checks may not be cashed until that date arrives
   b. Corrections without the initials of the person writing the check
   c. Number amount and written amount are different

5. Discussion should include:
   a. Make sure the card is one your business accepts
   b. Notice the expiration date
   c. Make sure the signature on the receipt matches the signature on the card
   d. Check the credit card number with the warning list of bad, lost, or stolen cards
   e. Contact the credit card company for authorization if any suspicion arises
   f. Hold the card, stall the customer, and contact the manager if you discover a stolen card
   g. Write in credit card numbers which do not print clearly when the card is put through the machine

6. Discussion should include:
   a. Do not accept checks in payment for money orders
   b. Do not cash if the amount has been altered, erased, or if the amount is in excess of the printed limit
   c. Notice the dates and signatures as on a regular check

7. Discussion should include:
   a. Have customer sign check in the presence of the person cashing it
   b. Compare the customer's signature with the signature on the front of the check made at the time the checks were purchased at the bank
   c. Have the customer sign the check again if it has already been endorsed without seeing him/her sign it

8. a, b, c, d, e, g

9. (NOTE: Date, tax, and total may vary.)

CLERK 60		DATE		
QUANT	DEPT	DESCRIPTION	$	¢
3	F	fish 1/1.98	5	94
1	E	fish food		59
1	H	aquarium	20	95
			27	48
		TAX		
		TOTAL		
SIGN		AM'T REC'D	30	00
CHARGE TO				
STREET				
CITY				
SEND TO				
STREET				
CITY				

10. a, b, c, d, e

11. a. Split bills

    b. Marked bills

12. Discussion should include:

    a. Examine both sides of bills

    b. Look for markings

    c. Casually or humorously let the customer know that you noticed any markings

    d. Do not put money into the cash drawer until the customer has acknowledged receiving the correct change

    e. Place marked bills under the cash drawer

13. Discussion should include:

    a. Suspected bill should be compared with another bill of the same denomination

    b. Hair outlines on counterfeit bills may blend into the background rather than being distinct

    c. Points around the colored seal may not be even, clear, and sharp on counterfeit bills

d. Crisscross lines on the border may not be clear and distinct

e. Serial numbers may be out of line, poorly spaced, printed too light or too dark, or the prefix letter of the serial number may not agree with the district letter in the seal

14. Discussion should include:

a. Inform your supervisor first

b. Write your name and date on the back of the bill for later identification

c. Write down any details you can remember about how you got it, who gave it to you, where you got it, and when you got it

d. Contact the police, U.S. Secret Service, commercial bank, or Federal Reserve bank

e. Do not return the money to the customer if the bills are discovered to be counterfeit

f. Stall the person passing the bills

g. Avoid arguments because the passer may also be an innocent victim

h. Write down the passer's description and license number if he/she leaves

15. a, b, d, h, i, j, k, l, m

16. Evaluated to the satisfaction of the teacher-coordinator

17. Performance skill evaluated to the satisfaction of the teacher-coordinator

CASH REGISTER
UNIT III

UNIT OBJECTIVE

After completion of this unit, the student should be able to operate a cash register using the touch method. He/she should be able to discuss procedures for handling mistakes and customer complaints and solve problems relating to the multiple pricing policy. He/she should be able to check and bag merchandise. This knowledge will be evidenced through demonstration and by scoring eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with cash register procedures to the correct definitions.
2. Label the parts of a cash register.
3. State the advantages of using the touch method of checking.
4. Describe the position of the hand when resting on the home-base keys.
5. Distinguish between the finger positions for numbers using one cash register key.
6. Distinguish between the finger positions for numbers using more than one cash register key.
7. List the finger positions for department keys.
8. Discuss reasons for having the manager periodically remove excess money from the cash drawer.
9. State the amount of money a checker can pay out without the manager's approval.
10. Discuss the procedure for handling underrings.
11. Discuss the procedure for handling overrings on nonsubtracting cash register.
12. Discuss the procedure for handling overrings on registers with a VOID or REFUND key.
13. State the procedure for handling department errors, refunds, and adjustments.
14. State reasons for recording sales immediately.

15. Discuss the procedure for handling multiple priced merchandise.

16. Solve problems related to multiple pricing policy.

17. Discuss the precautions which should be taken when handling coupons.

18. Discuss the procedure for handling food stamps, relief, and/or welfare orders.

19. State the reasons for using the correct size of sack.

20. List the activities which the checker should complete before operating the register.

21. List the steps for counting the change fund.

22. Discuss the proper method for arranging bills, coins, checks, and coupons in the cash drawer.

23. Select from a list proper checkstand procedures.

24. Discuss the proper way to handle customer complaints.

25. Discuss the precautions for preventing theft from the cash register.

26. Complete training station checklist.

27. Demonstrate the ability to:

    a. Use the touch method.

    b. Check and bag merchandise.

CASH REGISTER
UNIT III

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

   A. Provide student with objective sheet.

   B. Give pretest using objective sheet.

   C. Discuss unit and specific objectives.

   D. Provide student with information, job, and assignment sheets.

   E. Discuss information and assignment sheets.

   F. Make transparencies.

   G. Demonstrate and discuss procedures outlined in the job sheets.

   H. Provide student with dummy merchandise of various kinds and sizes.

   (NOTE: Dummy merchandise may be obtained from several companies, such as General Mills, Del Monte, Northern Paper Company, Gillette Company, and Gerber Company.)

   I. Provide student with a local tax table.

   J. Provide a watch with a second hand.

   K. Provide paper bags of various sizes.

   L. Teach basic math if necessary.

   M. Give test.

   N. Reteach if necessary.

   O. Test again until minimum standard is reached.

II. Student:

   A. Read objective sheet.

   B. Study information sheet.

   C. Take notes.

   D. Complete assignment sheets.

E. Demonstrate the ability to accomplish the procedures outlined in the job sheets.

F. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Transparency masters

      1. TM 1--Point-of-Sale System Sales Receipt

      2. TM 2--Universal Product Code

      3. TM 3--Hand Scanner

      4. TM 4--Modern Cash Registers

      5. TM 5--Proper Stance at Cash Register

      6. TM 6--Can Sizes

      7. TM 7--Counting the Change Fund

      8. TM 8--Cash Register Drawer

   D. Assignment sheets

      1. Assignment Sheet #1--Multiple Pricing Policy

      2. Assignment Sheet #2--Checkstand Procedure

      3. Assignment Sheet #3--Training Station Checklist

   E. Answers to assignment sheets

   F. Job sheets

      1. Job Sheet #1--Use the Touch Method

      2. Job Sheet #2--Check and Bag Merchandise

   G. Test

   H. Answers to test

II. References:

A. Riggs, Walter A. *Acura-Touch Instructor's Guide for Professional Supermarket Checkers.* Olympia, Washington: Coordinating Council for Occupational Education, 1972.

B. *Money Safeguarding Procedures.* Dayton, Ohio: National Cash Register.

C. Mahoney, Tom. "Revolution at the Checkout Counter." *The American Legion Magazine,* November, 1974, pp. 18-23.

D. "Check-out Clerks Hit with Gripes," *The Stillwater News-Press.* January 17, 1975, p. 5.

E. "The Sweda Tracking System: Series 700," Midwest Cash Register Company, Inc., 1017 NW 6th, Oklahoma City, Oklahoma.

F. "Equipment Guide '75, Electronic Front End," *Progressive Grocer.* December, 1974, pp. 62-68.

G. "Cash Handling Procedures: Oklahoma City Retail Division." Safeway Stores Inc., 400 NE 36th, Oklahoma City, Oklahoma.

H. Edison, Judith E., and Mills, Kenneth E. *Checker-Cashier.* Dallas: South-Western Publishing Company, 1969.

CASH REGISTER
UNIT III

INFORMATION SHEET

I. Terms and definitions

A. Touch method--Operating a cash register using specific finger positions for faster speed, rhythm, and accuracy

B. Overring--Mistake of punching an amount higher than the actual price

C. Underring--Mistake of punching an amount less than the actual price

D. Ledger sheet--Form on which a checker records errors and money payed out for returns so that the amount of money put into the register will balance with the amount of sales and taxes rung up at the end of the day

E. Multiple pricing--Pricing of merchandise in terms of quantities of more than one unit; sometimes called unit pricing

Example: Customer may purchase one can for 10¢ or, with multiple pricing, three cans for 29¢

F. Change fund--Supply of change placed in the cash register for use during the day

G. Point-of-sale system--Electronic cash register system wired to a computer which provides additional information on the sales receipt; records sales, changes in inventory, and cash supply in the accounting office (Transparency 1)

H. Operating crank--Handle used to operate an electric register during power failure

(NOTE: The operating crank should be kept where it can be found quickly, someplace other than the register drawer.)

I. Activity counter--Part of the register which records the number of times certain information keys are used

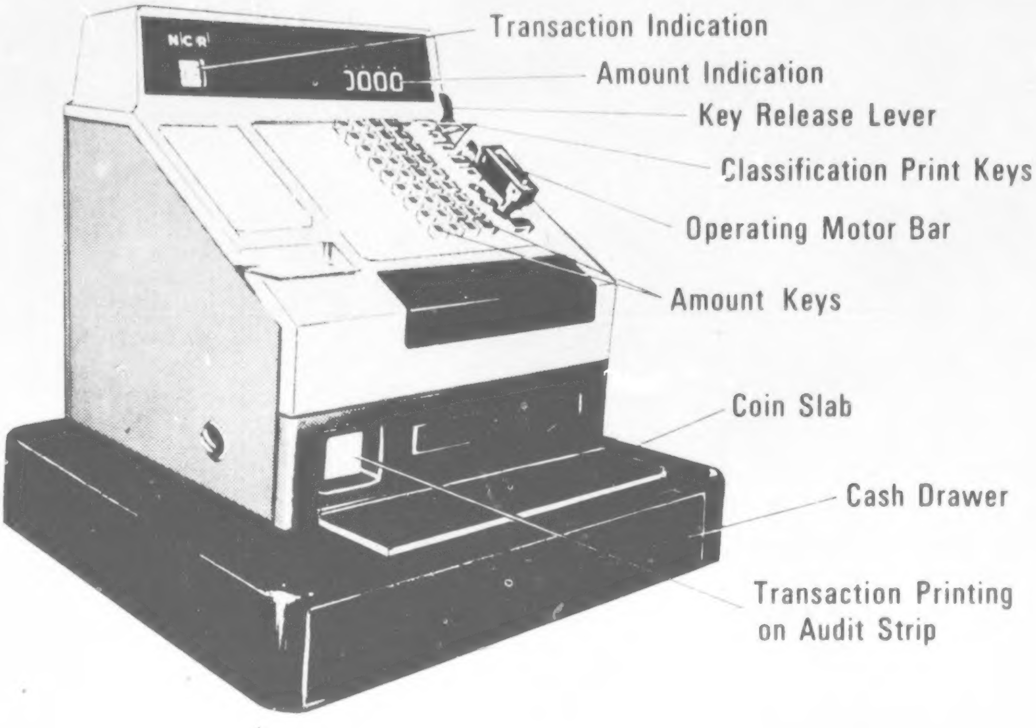
(NOTE: Management uses this data to check the number of sales by each checker and the amount of sales in each department.)

J. Universal Product Code--Set of numbers printed on a package to identify particular product, manufacturer, and price information when scanned by a point-of-sale cash register system (Transparency 2)

INFORMATION SHEET

K. Scanner—Instrument that reads information from the Universal Product Code; held in the checker's hand or built into the countertop (Transparency 3)

II. Parts of a cash register (Transparency 4)


Transaction Indication
Amount Indication
Key Release Lever
Classification Print Keys
Operating Motor Bar
Amount Keys
Coin Slab
Cash Drawer
Transaction Printing on Audit Strip

III. Advantages of using touch method of checking

A. Increases speed

B. Allows merchandise to be handled more carefully

C. Makes it easier to watch prices

D. Causes less frustration and fatigue

INFORMATION SHEET

E. Reduces error frequency by 46%

F. Reduces net dollar loss by 48%

G. Allows checker to face customers (Transparency 5)

IV. Home-base keys

A. Thumb on the 20¢ key

(NOTE: Some checkers place the thumb on the 10¢ key if it is more comfortable for their hand.)

B. Index finger on the 50¢ key

C. Middle finger on the 7¢ key

(NOTE: Some checkers place the thumb on the 6¢ key.)

D. Side of hand or little finger on the operating motor bar

V. Finger positions for numbers using one cash register key

A. Thumb--All numbers beginning with or below 3

(NOTE: Some checkers punch numbers beginning with or below 4 depending on the size of their hands.)

Example: 1¢, 2¢, 3¢, 10¢, 20¢, 30¢, $10

B. Index finger--All numbers beginning with or above 4

Example: 4¢, 5¢, 8¢, 9¢, 60¢, 70¢

VI. Finger positions for numbers using more than one cash register key

A. Parallel numbers beginning with or below 3--Punched by placing the thumb between the parallel numbers and pushing both numbers at once

(NOTE: Some checkers are more comfortable using the thumb on numbers beginning with or below 4.)

Example: $3.30, 33¢, $1.10, 22¢

B. Parallel numbers beginning with or above 4--Punched at the same time by the index and middle fingers

Example: 44¢ 55¢, 88¢, 99¢

INFORMATION SHEET

C. Catercorner numbers beginning with or below 3--Punched at the same time with the thumb on the smaller digit key and the index finger on the larger digit key

Example: For 32¢ the index finger would punch the 3 and the thumb the 2. For 23¢ the thumb would punch the 2 and the index finger the 3

D. Catercorner numbers beginning with or above 4--Punched at the same time by the index and middle finger

Example: 45¢, 56¢, 76¢, 98¢, $9.80

E. All other numbers--Punched at the same time with the thumb on the smaller digit key and the index finger on the larger digit key

(NOTE: The middle finger and thumb may be used if the keyboard is too long for the checker's hand.)

Example: To punch 97¢ the checker would punch the 9 with his index finger and 7 with his thumb. To punch 14¢ the checker would punch the 1 with his thumb and 4 with his index finger

VII. Finger positions for department keys (Job Sheet #1)

A. Use the middle finger for department keys on the right side of the keyboard

B. Use the thumb for department keys on the left side of the keyboard

VIII. Reasons for having the manager periodically remove excess money

A. Eliminates the chance of money falling out of a full change drawer

B. Reduces money in the cash drawer in case of robbery

C. Keeps other checkers from running low on change

IX. Without the manager's approval most checkers can pay out only one dollar at times other than when making change

Example: Pop bottle returns and refunds

X. Underrings

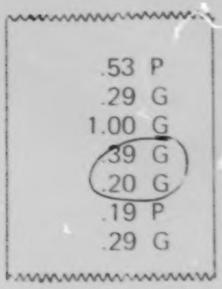
(NOTE: The average sale is underrung by two cents.)

INFORMATION SHEET

A. Ring the item again for the amount necessary to bring it up to the correct price

Example: If the checker rings up 59¢ for a 69¢ item, the checker needs to ring up an additional 10¢

B. Circle at once with an ink pen the two rings on the tape receipt



.53 P
.29 G
1.00 G
.39 G
.20 G
.19 P
.29 G

Underring:
59¢ item rung
as 39¢

C. Explain the mistake to the customer

XI. Overrings on nonsubtracting cash register

A. Ring the item again for the correct price

B. Enter the entire amount of the item overrung, the department, and the sales tax on the ledger sheet in ink

V - is for Void
G - is for Grocery Department
Tx - is for Tax

Item	OK	Price	
		$	c
VG			59
VTx			03

C. Collect the total amount shown on the tape and pay the customer the amount of the overring if the store gives cash refund

INFORMATION SHEET

D. Show the transaction on the receipt tape if the store subtracts the amount of the error from the total amount of money collected

.49 G
.33 G
.79 P
1.49 M
.59 G ← error
.39 G ← correction

ST 4.08
TX .18
T 4.26
.62 ← $ .59 error
+ .03 tax
$ .62
3.64

XII. Overrings on a cash register with a VOID or REFUND key

A. Ring the wrong amount again while pushing the VOID or REFUND key which will automatically subtract the wrong amount

B. Ring the correct amount

C. Enter the error on the ledger sheet

(NOTE: Tax is not refunded or shown on the ledger because it has not yet been added to the total.)

XIII. Department errors, adjustments, and refunds need to be recorded on the ledger only

A. Department error

Item	OK	Price	
		$	c
VG			59¢
P			59¢

A 59¢ produce item incorrectly rung up in the grocery department.

INFORMATION SHEET

B. Adjustment

PO Newspapers		2	95
PO Invoice #73		6	75

Paid out for newspapers--
$2.95
Paid out for invoice #73--
$6.75

C. Refund

Refund for a bad chicken returned. Amount of chicken--$2.49

Rf Chicken		2	49
VTx			12

XIV. Reasons for recording sales immediately

A. Checker could forget to ring up money left for merchandise already taken

B. Merchandise could easily be rung up to the wrong department

C. Checker could look suspicious

XV. Multiple priced merchandise (Transparency 6)

A. Turn all items price side up

1. Many items look alike but have different prices
2. Prices may be confused because of similar can sizes

B. Set aside all multiple priced items until the checker can see if the entire multiple priced group is being purchased

C. Remind the customer that he/she can save money by purchasing the entire multiple priced group

INFORMATION SHEET

XVI. Multiple pricing policy--Fractions of a cent go to the store (Assignment Sheet #1)

Example: If a can is marked 3 for 25¢, one unit would cost 9¢, two units would cost 17¢, and three units would cost 25¢. Some stores would charge 9¢ each for two items

XVII. Coupons

(NOTE: Coupons are commonly refunded after the transaction is completed.)

A. Use only at the time merchandise is purchased

B. Verify the expiration dates

C. Are invalid unless the product is purchased

XVIII. Procedure for handling food stamps, relief, and/or welfare orders

A. Detach stamps from the original booklet in the presence of the checker

B. Do not use for bottle deposits, tobacco, and alcoholic beverages

C. Ask for identification

D. Give scrip or unendorsed coupons for change instead of money

(NOTE: A scrip is a document used as evidence that the holder is entitled to something. It can be used just like money.)

E. Do not make it obvious to other customers that you are helping a customer on a government assistance program

XIX. Reasons for using the correct size of sack

A. Larger sacks are costly to the store and encourage shoplifting

B. Sacks which are too small will tear and lose customer goodwill

XX. Before operating the register

A. Check daily price changes

B. Check the supply of tapes in the register

C. Do not allow displays to hide the register

INFORMATION SHEET

XXI. Counting the change fund (Transparency 7)

A. Keep a cardboard cover the size of the bill compartment of the cash drawer in a convenient place

B. Place the cardboard over the bill compartment of the cash drawer

C. Empty the coins onto the cardboard

D. Count the coins one denomination at a time as they are placed in the proper compartment

E. Total the amount of the coins and currency on the back of the "No Sale" receipt which was issued when you recorded "No Sale" to open the cash drawer

XXII. Cash drawer arrangement (Transparency 8)

A. Place all bills facing the same way

1. Prevents mistakes

2. Saves time arranging the money to send to the bank

B. Arrange the money from right to left with the smaller bills and coins on the right

C. Keep checks, coupons, and large bills tied together with a rubber band or paper clip and place them under the change drawer

D. Wrinkle new bills so they will not stick together

XXIII. Checkstand procedures (Transparency 5, Assignment Sheets #2 and #3, Job Sheet #2)

A. Smile and greet each customer

B. Wear comfortable shoes

C. Keep right hand on the register and face customers while leaning comfortably on the baskets

D. Call aloud each price in a clear distinct voice

E. Group check by departments as much as possible

F. Watch the lower decks of shopping baskets for missed merchandise

G. Give the customer your individual attention and do not discuss trivial matters or personal problems with fellow employees

INFORMATION SHEET

H. Handle complaints tactfully and courteously

(NOTE: Some checkers estimate they receive 150 complaints a day.)

I. Make sure the customer can see both hands away from the scale if it is necessary to weigh merchandise

J. Ask the customer if he/she needs anything else before ringing up the total

K. Place the money received for merchandise on the coin slab while making change

L. Place the customer's receipt with the merchandise or in the customer's hand

M. Move items to bagging area with the left hand while checking with the right hand

(NOTE: This should be done if a sacker is available.)

N. Stand up a flat-bottom bag and place the small merchandise in the bag with the left hand while checking

(NOTE: This should be done if a sacker is not available.)

O. Call for the sackers before you need them

P. Finish all register transactions before wrapping or sacking if merchandise requires sack without flat bottom

Q. Invite customers waiting in a long line to move to another register

R. Learn the store code used to call for help over an intercom system

Example: "Customer service, number three" might mean the cashier needs to have the manager approve a customer's personal check

S. Determine store policy about where to keep the cash register key

T. Never use your own money to make change

U. Record each sale and item separately

V. Thank the customer for shopping in your business

W. Do not ask the customer the price of an item

X. Do not block off the checkstand with people in line in order to take a break

Y. Stop checking if customer interrupts

INFORMATION SHEET

Z. Know the various can and package sizes so they will not be checked at a wrong sale price (Transparency 6)

AA. Replace the tapes when colored streaks appear on the paper

(NOTE: The checker usually replaces the customer's receipt tape, and the manager changes the detail audit tape. Instructions for changing tapes are usually inside the side panel doors.)

BB. Be courteous to customer's children

CC. Keep sacks stacked neatly and slippery spots wiped up

XXIV. Handling customer complaints

A. Listen

B. Apologize for any inconvenience

C. Let the customer know that you understand the problem

D. Do not argue

E. Thank the customer for calling the matter to your attention

F. Explain that individual items may vary in price but that overall prices are about equal

G. Avoid contradicting a customer's statement but emphasize your store's positive qualities and services

H. Call the manager in situations that you cannot handle

XXV. Preventing theft

A. Never invite customers behind the counter where the register is located

B. Open the register only while ringing up a sale

C. Never be distracted or bend over with the cash drawer open

(NOTE: Till tappers often work in pairs so one may distract the checker by asking about merchandise while the other takes money from the cash drawer.)

D. Close drawers before wrapping merchandise

E. Lock registers when not in use

Point-of-Sale System Sales Receipt

ADAIR'S SUPERMARKETS
721 S. ORLANDO ST.
TROY OHIO 75373
STORE 59 06/06/74

GRO	.79D	MIN RICE
GRO	.25D	CAN PEAS
GRO	.65D	RICE
GRO	.12D	PUDDING
GRO	1.18D	POLISH
GRO	.29D	SOAP
GRO	.19D	GREEN PEA
GRO	.37D	TOM SOUP
MT	1.98D	T BONE
MT	2.78D	RIB EYE
GRO	.07D	KOOL AID
GRO	.07D	KOOL AID
GRO	.06D	KOOL AID
GRO	.98D	SODA POP
	.30H	BT DEP
GRO	.32D	SODA POP
	.10H	BT DEP
GRO	.34D	CAKE MIX
GRO	.34D	CAKE MIX
GRO	.19D	TOM RICE
GRO	.19D	TOM RICE
GRO	.32D	CAKE MIX
GRO	.34D	CAKE MIX
GRO	.34D	CAKE MIX
GRO	.38D	CAKE MIX
	12.88	TOTAL
	15.00	CASH
	2.12	CHANGE

124 TS
0003 01 1 4.09PM

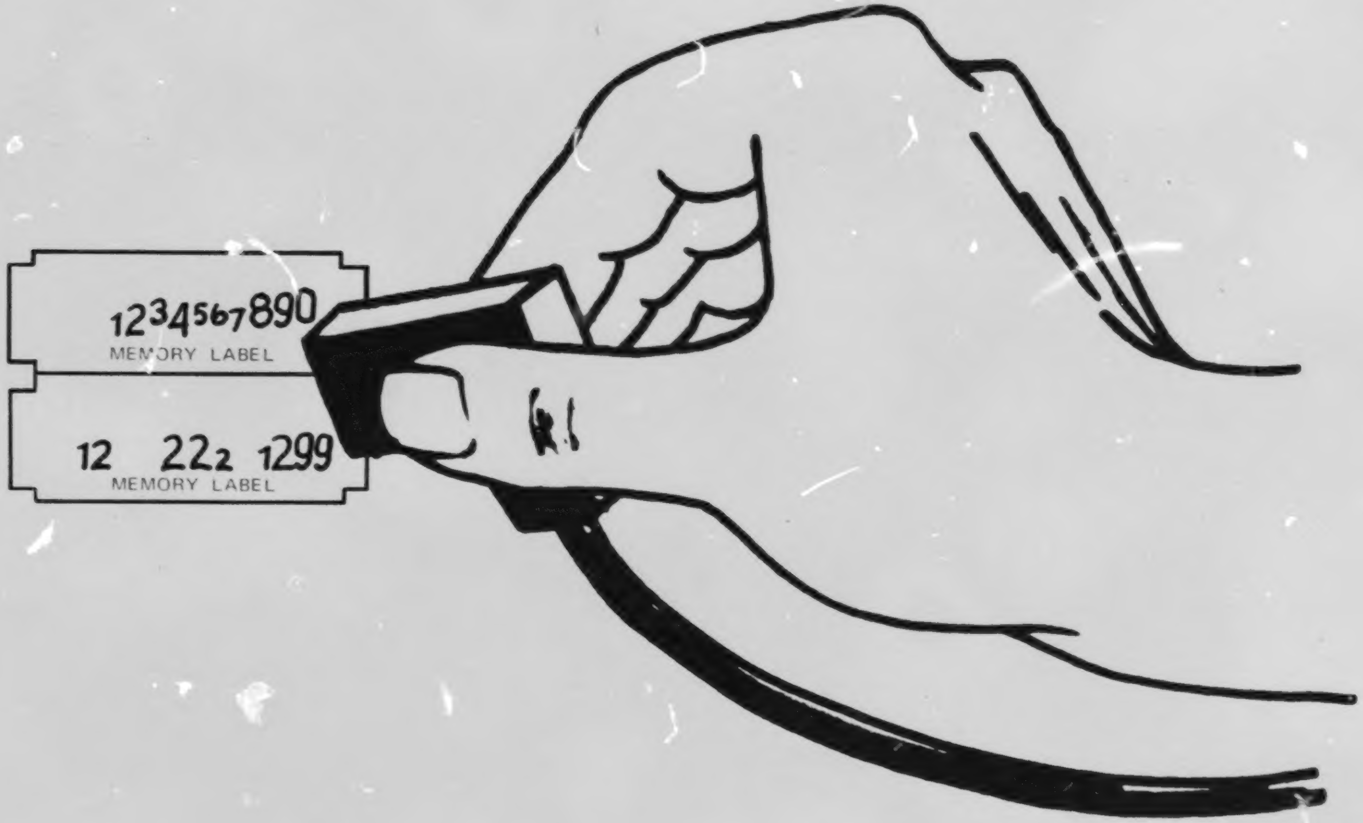
New tapes allow more spaces per line and may be printed in two languages

Universal Product Code

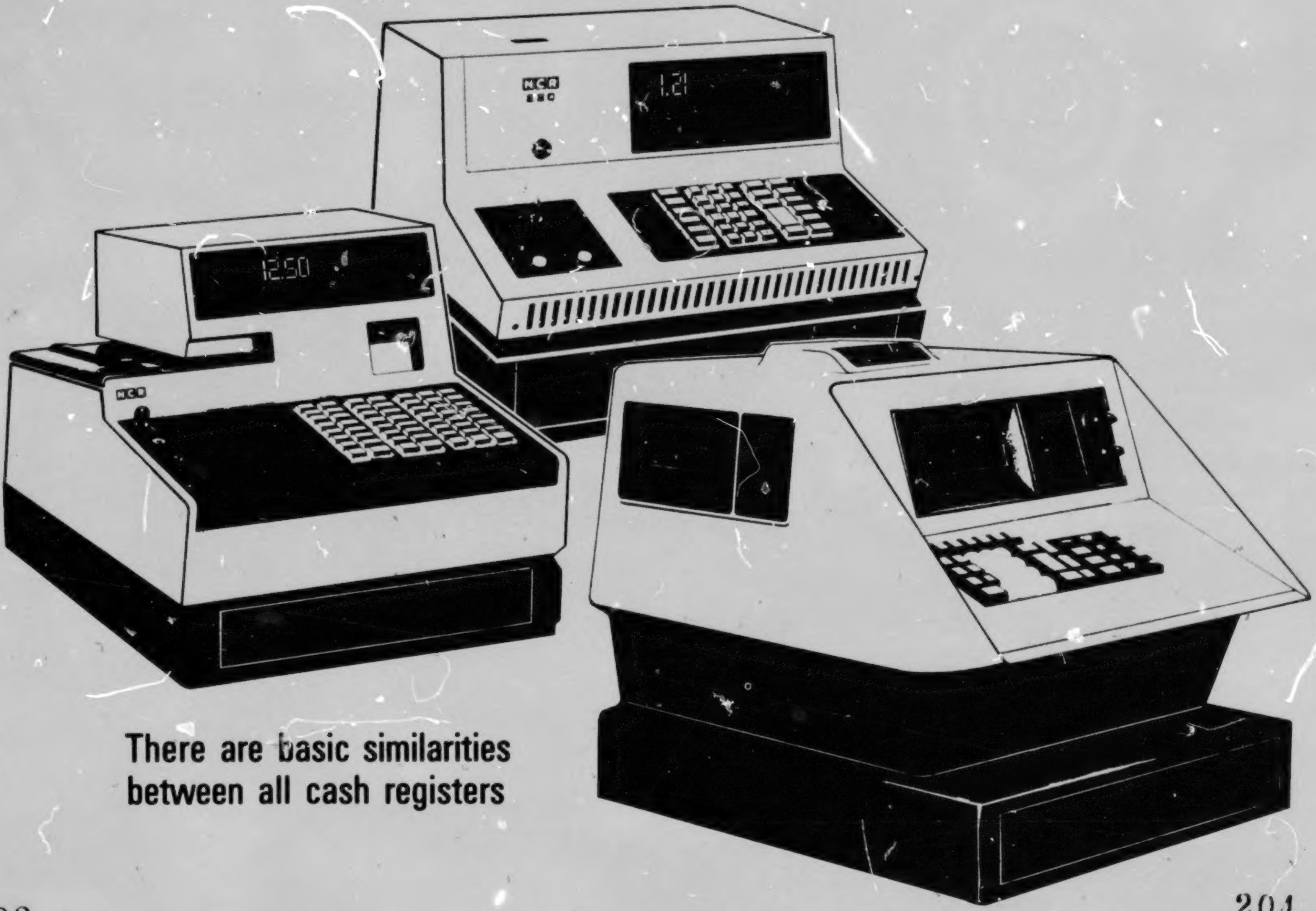
0 36000 24490

200

Hand Scanner


1234567890
MEMORY LABEL
12 222 1299
MEMORY LABEL

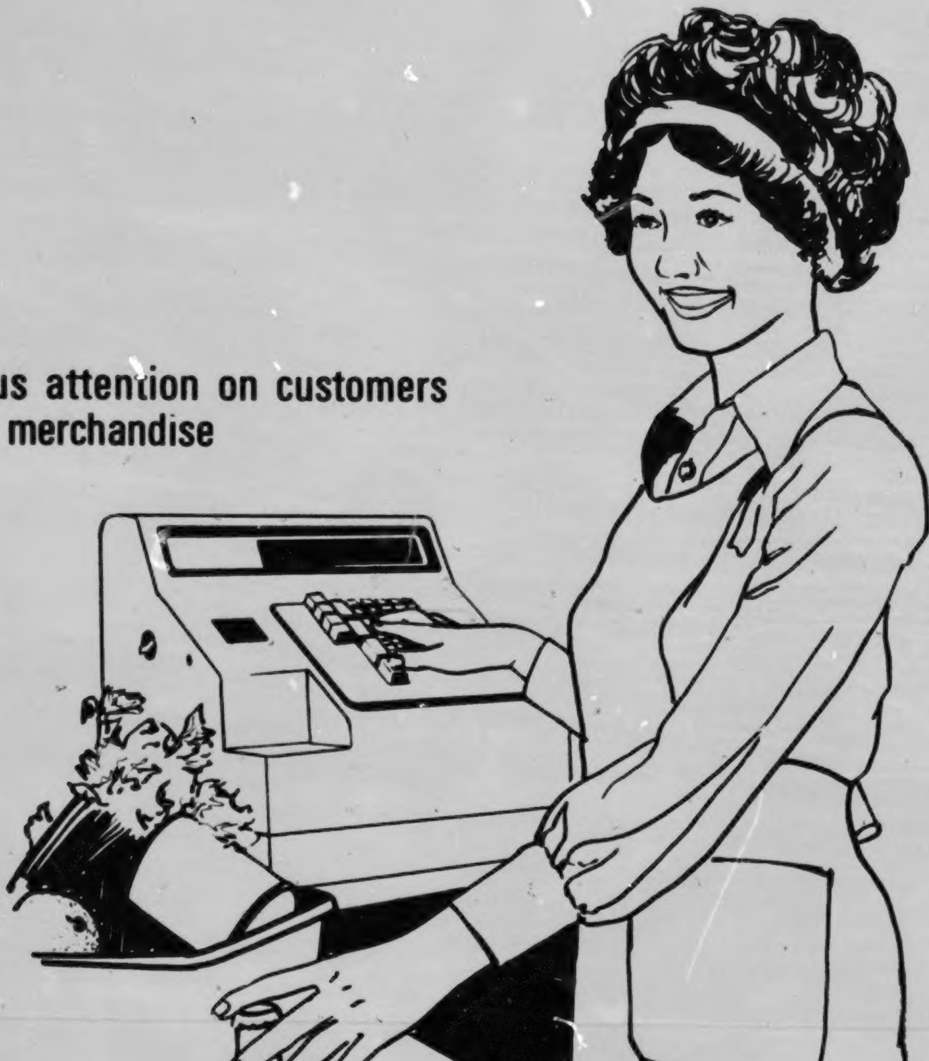
Modern Cash Registers


NCR
1.21
12.50
NCR

There are basic similarities
between all cash registers

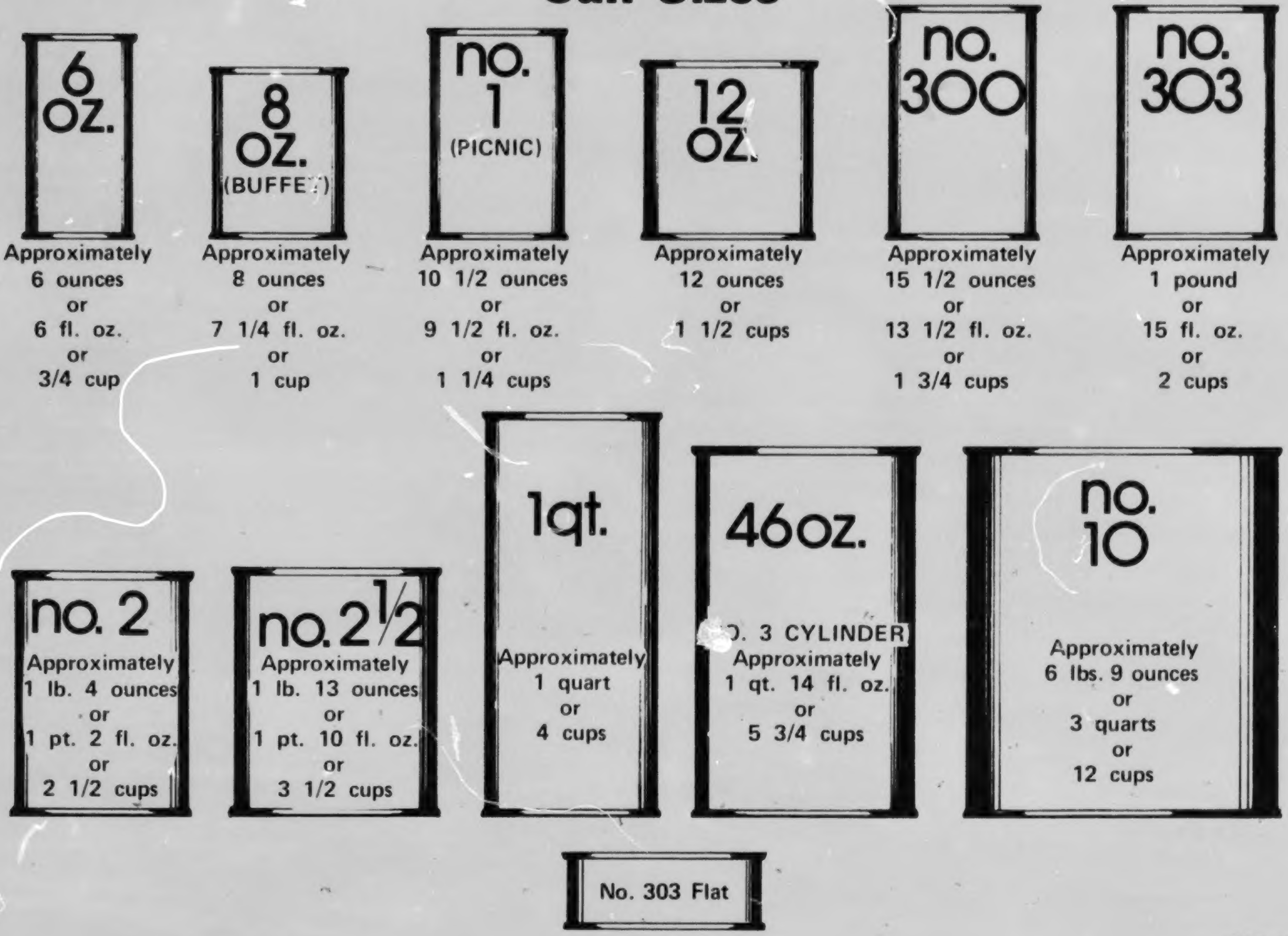
DE II - 121-B

Proper Stance at Cash Register



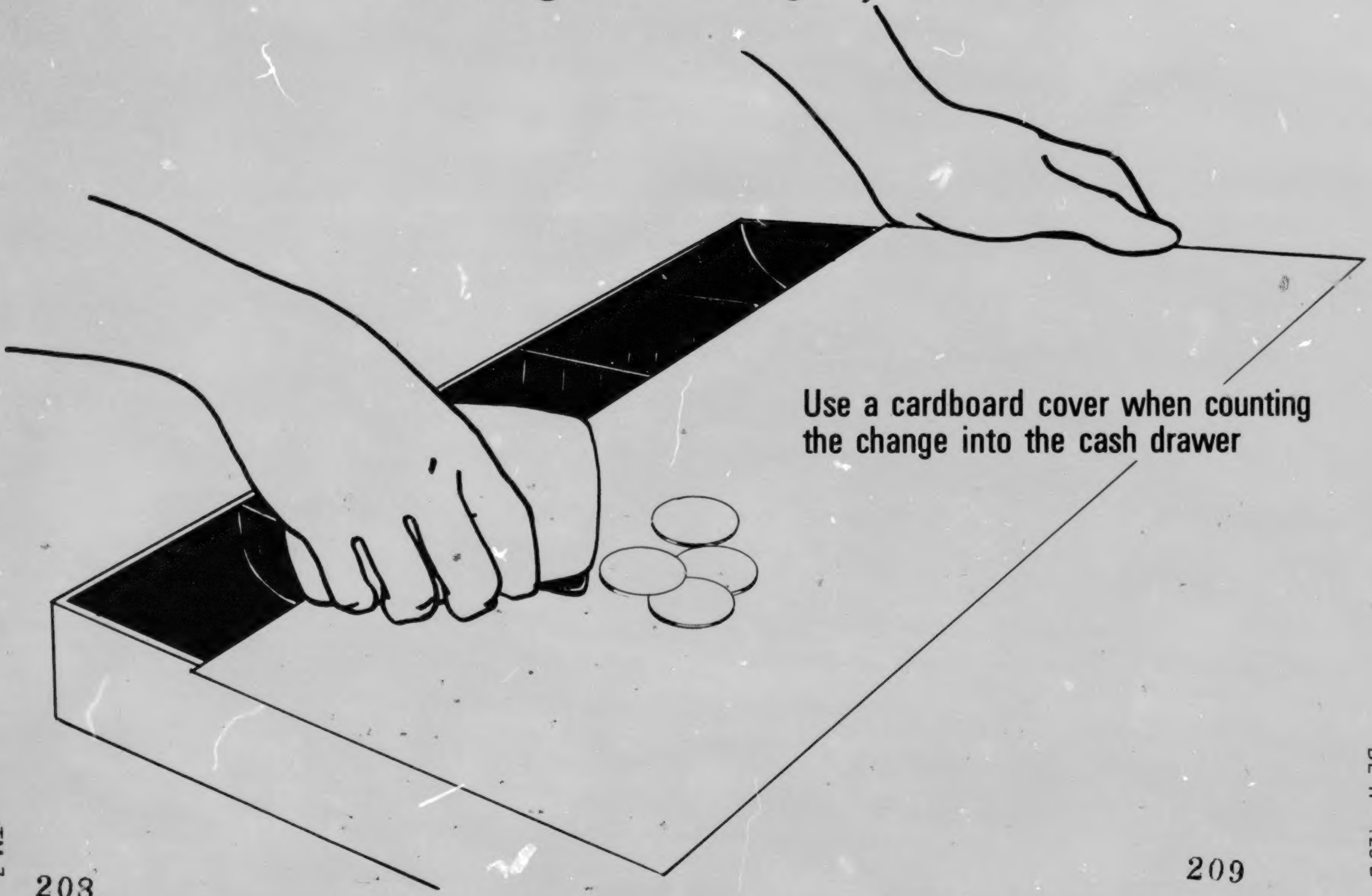
Focus attention on customers and merchandise

Can Sizes


6 oz.
8 oz. (BUFFET)
no. 1 (PICNIC)
12 oz.
no. 300
no. 303
no. 2
no. 2½
1qt.
46oz.
[illegible]O. 3 CYLINDER
no. 10
No. 303 Flat

Can	Contents
6 oz.	Approximately 6 ounces or 6 fl. oz. or 3/4 cup
8 oz. (BUFFET)	Approximately 8 ounces or 7 1/4 fl. oz. or 1 cup
no. 1 (PICNIC)	Approximately 10 1/2 ounces or 9 1/2 fl. oz. or 1 1/4 cups
12 oz.	Approximately 12 ounces or 1 1/2 cups
no. 300	Approximately 15 1/2 ounces or 13 1/2 fl. oz. or 1 3/4 cups
no. 303	Approximately 1 pound or 15 fl. oz. or 2 cups
no. 2	Approximately 1 lb. 4 ounces or 1 pt. 2 fl. oz. or 2 1/2 cups
no. 2½	Approximately 1 lb. 13 ounces or 1 pt. 10 fl. oz. or 3 1/2 cups
1qt.	Approximately 1 quart or 4 cups
46oz. ([illegible]O. 3 CYLINDER)	Approximately 1 qt. 14 fl. oz. or 5 3/4 cups
no. 10	Approximately 6 lbs. 9 ounces or 3 quarts or 12 cups
No. 303 Flat	

Counting the Change Fund

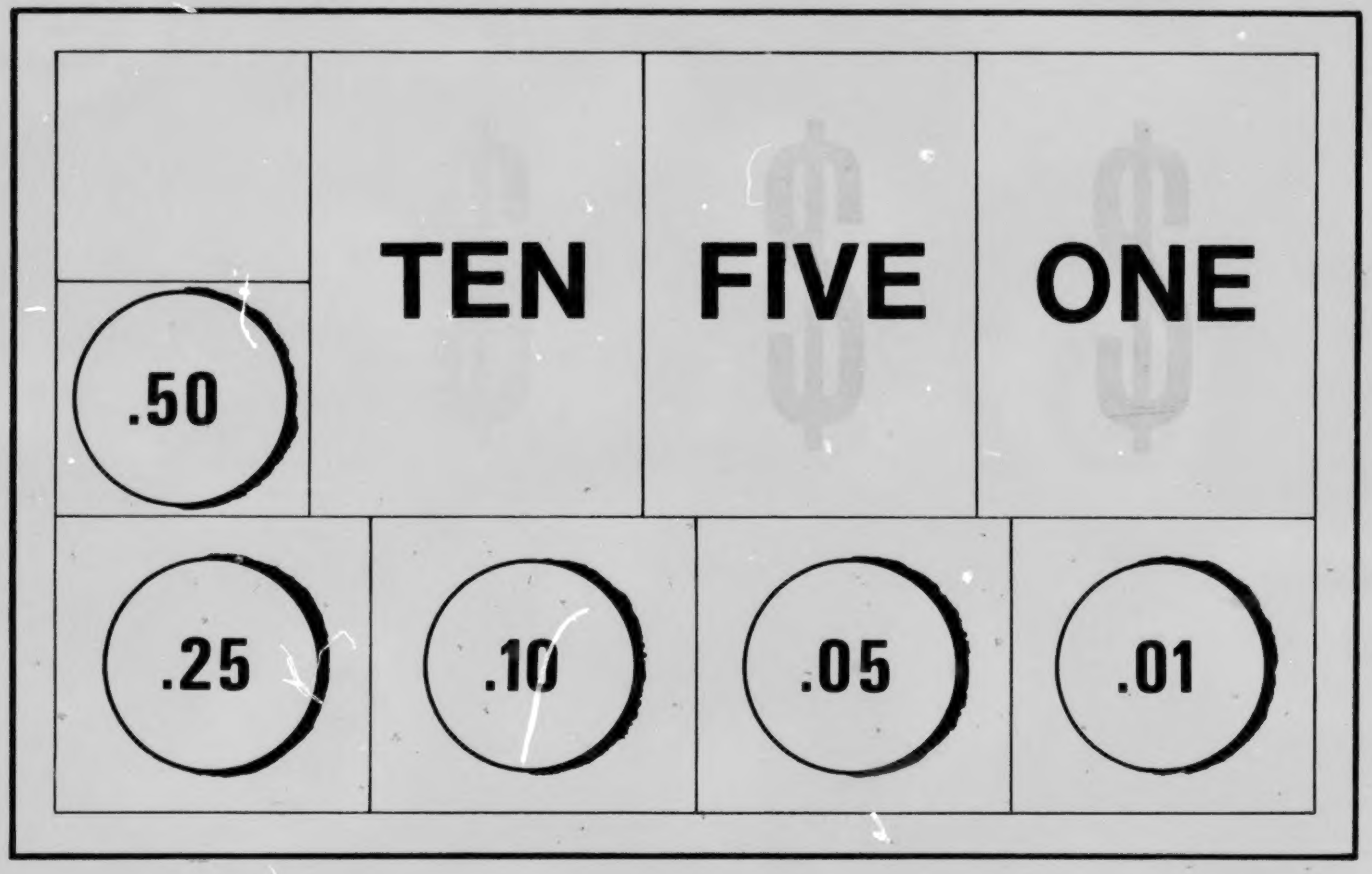


Use a cardboard cover when counting the change into the cash drawer

TM 7

DE II - 125-B

Cash Register Drawer


TEN
FIVE
ONE
.50
.25
.10
.05
.01

CASH REGISTER
UNIT III

ASSIGNMENT SHEET #1--MULTIPLE PRICING POLICY

Work the following problems. Do not figure tax.

1. During a special sales promotion the student store had packs of notebook paper priced at 3/$.98. Joe Student did not have enough money to purchase three packages. How much money would Joe need in order to buy two packages?

2. Foxy Fanny went to the drugstore to purchase some eyeshadow priced at 4 shades for $4.50. However, Foxy only had $3.00 left out of her paycheck. How many shades of eyeshadow can Foxy purchase and how much would each cost?

3. Sally Super went to the grocery store for her mother. Sally bought a #202 can of green beans priced at 2/$.65, a loaf of bread at $.59, and three packages of bologna at $1.25 each. How much was her total purchase?

4. DECA Don wanted to buy one pair of faded denims priced 2/$12.95. How much will one pair of denims cost?

ASSIGNMENT SHEET #1

5. Vicki Varoom wanted to purchase a present for her boyfriend's birthday. She could get a chrome gas pedal and matching gear shift knob by purchasing the items as a set for $16.98. Vicki could also purchase a fuzzy stearing wheel cover with a matching stuffed snake to sit in the rear window for $9.69 a set. If she decided to break up the sets and purchase the gas pedal and stuffed snake instead, how much would the present cost?

6. a. If a large sack costs 3/4¢ and a small sack costs 1/2¢ how much would it cost the store if a sacker used three large sacks when he/she should have used three small sacks?

   b. What would it cost the store if seven employees carelessly did the same thing?

   c. How much would this cost the store during a year of two hundred sixty working days?

   d. How many additional small sacks could be bought if that unnecessary expense was saved?

CASH REGISTER
UNIT III

ASSIGNMENT SHEET #2--CHECKSTAND PROCEDURE

Review the following checklist. Have your fellow students rate your checkstand performance while you role play a situation of checking merchandise, bagging, and counting change. Use the attached ledger sheet to correct mistakes.

	Good	Fair	Poor
a. Smile			
b. Greeting			
c. Neat, clean appearance			
d. Lack of chewing gum and/or nervous gestures			
e. Posture and stance			
f. Calling prices loud enough for customer to hear			
g. Calling prices clearly			
h. Using correct finger positions			
i. Returning to home-base keys			
j. Resting hand on register			
k. Informing customer about underrings and overrings			
l. Group checking by departments			
m. Checking multiple priced items together			
n. Reminding customer of advantage of buying all of a multiple priced group			
o. Handling complaints skillfully			
p. Handling interruptions			

ASSIGNMENT SHEET #2

		Good	Fair	Poor
q.	Amount of conversation			
r.	Noticing mismarked merchandise			
s.	Remembering sale prices			
t.	Knowing various sizes of cans and packages			
u.	Checking identification for alcohol purchases, personal checks, and coupons			
v.	Recording each sale and item separately			
w.	Asking customer if he/she needs anything else before ringing up the total			
x.	Accuracy			
y.	Speed			
z.	Giving the customer the receipt			
aa.	Bagging merchandise while checking			
bb.	Calling for sacker early and pushing items to bagging area with left hand			
cc.	Bagging heavy items on the bottom, building the sides with boxes, placing wet or breakable items in separate sacks			
dd.	Not making bags too heavy or bulky			
ee.	Using the proper size bag or sack			
ff.	Figuring tax correctly			

ASSIGNMENT SHEET #2

	Good	Fair	Poor
gg. Placing money received on the coin slab			
hh. Counting money twice, once to self and again into the customer's hand			
ii. Calling back amount of sale and amount received before counting back change			
jj. Counting each coin back separately			
kk. Asking the customer to acknowledge that the money exchange is correct by ending with "right?" or "correct?"			
ll. Placing money in drawer properly			
mm. Thanking the customer			
nn. Locking checkstand when leaving			

LEDGER

Item	OK	Price	
		$	¢

CASH REGISTER
UNIT III

ASSIGNMENT SHEET #3--TRAINING STATION CHECKLIST

Show the following checklist to your training station sponsor or to another local store manager and discuss any local exceptions to what you have been taught in the classroom. Have the sponsor sign the sheet and then report local policies and procedures to the class on the following class period.

x x x x x

Students were taught the following policies concerning cash register procedures. If this does not agree with your policy, please advise this trainee.

x x x x x

1. Pay-outs

   Do not pay out more than one dollar, at times other than when counting change, without the manager's approval.

x x x x x

2. Underrings

   Ring the item again for the amount necessary to bring it up to the correct price and circle the two rings so the customer will know it is one item.

x x x x x

3. Overrings

   Ring the correct price and enter the error, department, and tax on the correction sheet. Collect the total amount shown on the tape. Pay the customer for the overring or subtract the error from the total before collecting payment. Show the subtraction on the sales receipt.

x x x x x

4. Refunds, adjustments, and department errors

   Record these on the ledger and pay them out in cash.

x x x x x

ASSIGNMENT SHEET #3

5. Coupons

Verify expiration date and use only for merchandise purchased at the time. Place coupons together with a paper clip under the cash drawer.

x x x x x

6. Stamps and other government assistance programs

Stamps must be removed from the booklet in the checker's presence and may not be used for bottle deposits, tobacco, or alcoholic beverages. Ask for identification and give scrip or unendorsed coupons for change. Do not make it obvious that you are helping a customer on a government assistance program.

x x x x x

7. Other areas covered

Operating a cash register, using sacks that are the correct size, counting the change fund, figuring multiple priced merchandise, checking for daily price changes, correct posture and stance at the register, calling prices aloud, checking the lower decks of baskets, giving customers full attention, keeping hands away from scales, placing money received on the coin slab while making change, giving the customer his receipt, and thanking the customer for shopping in your business.

x x x x x

The checker should call the supervisor about any problems he/she does not know how to handle or should not handle.

x x x x x

Since the use of salesperson keys, no-sale keys, and mechanisms which number receipts and tell the date vary with different styles of registers, please explain how your model of register operates.

x x x x x

____
Supervisor/manager

CASH REGISTER
UNIT III

ANSWERS TO ASSIGNMENT SHEET

Assignment Sheet #1

1. $.66
2. 2 @ $1.13 each
3. $4.67
4. $6.48
5. $13.34
6. a. 3/4¢
   b. 5 1/4¢
   c. $13.65
   d. 2,730

CASH REGISTER
UNIT III

JOB SHEET #1--USE THE TOUCH METHOD

(NOTE: Accuracy on the cash register is important because the information recorded on the register tape may be used to determine shrinkage, measure sales, and influence decisions on what to reorder. Accuracy is also important for winning a customer's confidence, particularly with rising prices and the use of hand calculators by customers to determine the accuracy of the checker. Develop the habit of using the correct finger positions as you would in learning to type or to play a musical instrument. In a short time both speed and accuracy will develop. The touch method may be used on most major kinds of registers.)

I. Materials

   A. Cash register

   B. Tape

   C. Dummy merchandise

   D. Department labels

   E. Sample problems

   F. Watch

II. Procedure

   A. Place pieces of tape on the home-base keys so you may feel the keys without watching the keyboard

   B. Label the department keys A, B, C, D, and E

JOB SHEET #1

C. Have someone call the numbers on the following pages aloud

D. Practice checking until you can accurately check each list in one minute or less

E. Use the tax table for your area to figure tax on the subtotal

F. Add tax to the subtotal to get the final total

JOB SHEET #1

	Exercise 1			Exercise 2	
	Amount	Department		Amount	Department
	.01	A		.04	B
	.10	D		.09	A
	.03	B		.90	C
	.02	C		.05	B
	.01	A		.40	C
	.03	D		.80	C
	2.00	E		.08	B
	.10	C		.06	D
	.01	B		.50	E
	.02	E		7.00	E
	.20	D		.60	A
	.03	E		.07	B
	.01	A		6.00	E
	.30	E		.60	D
	.20	C		.50	C
	.02	D		.08	B
	.10	B		.09	E
	1.00	A		5.00	D
	.30	C		.40	A
	.10	D		.08	C
	.02	A		.09	D
	3.00	C		.70	D
	.20	B		.07	A
	.02	B		4.00	A
Subtotal	7.83		Subtotal	28.20	
Tax			Tax		
Total			Total		

JOB SHEET #1

	Exercise 3			Exercise 4	
	Amount	Department		Amount	Department
	.11	D		.45	C
	.09	C		.33	D
	.44	E		.56	A
	.22	B		.55	E
	.10	C		.89	C
	.80	B		.77	A
	.33	E		.78	D
	.20	D		.01	E
	.70	E		.04	A
	.44	C		.80	E
	02	B		.22	C
	03	D		.99	A
	.55	A		.02	A
	.60	E		.05	B
	.50	C		.90	D
	.66	B		.06	A
	.40	D		88	C
	.33	A		.66	B
	.77	E		.87	B
	.10	C		.11	D
	.20	A		.98	C
	.88	D		.65	E
	.30	B		.03	D
	.99	D		.54	E
Subtotal	9.76		Subtotal	12.14	
Tax			Tax		
Total			Total		

JOB SHEET #1

Exercise 5

	Amount	Department
	.12	A
	.34	C
	.23	B
	.56	C
	.65	A
	.46	E
	.43	B
	.75	D
	2.10	E
	.86	E
	.32	A
	.35	C
	1.20	B
	.76	D
	4.30	E
	.52	A
	3.20	C
	2.30	D
	.61	A
	3.40	E
	.17	B
	.49	D
	.21	C
	.67	B
Subtotal	25.00	
Tax		
Total		

CASH REGISTER
UNIT III

JOB SHEET #2-CHECK AND BAG MERCHANDISE

I. Materials

   A. Cash register

   B. Dummy merchandise

   C. Basket or box

   D. Sacks

II. Procedure

   A. Place the following prices on dummy merchandise, empty bottles, empty cans, or on slips of colored paper representing different departments and multiple priced groups

1.10
3/.49
4.30
2/.25
2.20
4/.39
5.60
5/1.00
2 cans @ 3/.98
1 can @ 2/.69
3.30
3 cans @ 5/.49
8.90
1.20
4.40
1 can @ 4/.98
7.80
.30
5.50
.03
3.20
.44
6.60
.45

59.01 Subtotal

Tax

Total

JOB SHEET #2

B. Remove items from a basket or box and place them in sacks with the left hand while checking by department and multiple priced groups with the right hand (vice versa for left-handed persons)

C. Use the tax table for your locality and figure tax on the subtotal

D. Add tax to the subtotal to get the final total

CASH REGISTER
UNIT III

TEST

1. Match the terms on the right to the correct definitions by placing the appropriate numbers in the blanks provided.

_____a. Form on which a checker records errors and money payed for returns so that the amount of money put into the register will balance with the amount of sales and taxes rung up at the end of the day

_____b. Mistake of punching an amount less than the actual price

_____c. Mistake of punching an amount higher than the actual price

_____d. Pricing of merchandise in terms of quantities of more than one unit; sometimes called unit pricing

_____e. Handle used to operate an electric register during power failure

_____f. Supply of change placed in the cash register for use during the day

_____g. Operating a cash register using specific finger positions for faster speed, rhythm, and accuracy

_____h. Instrument that reads information from the Universal Product Code; held in checker's hand or built into the countertop

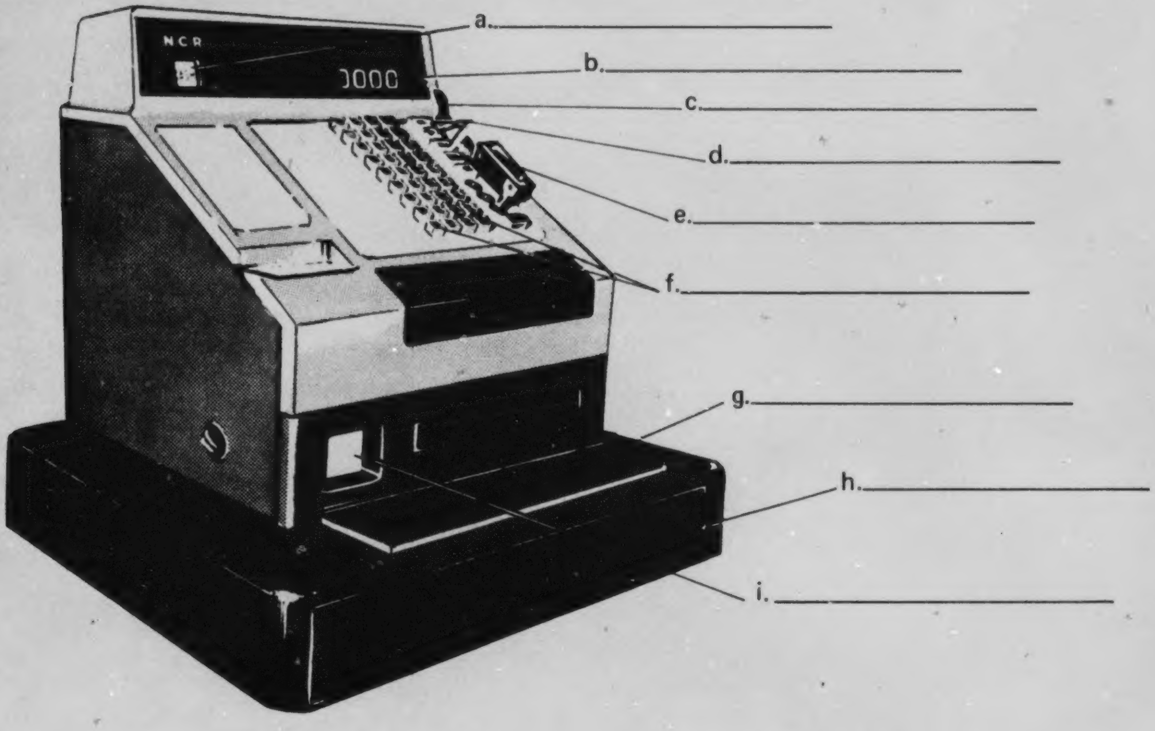
_____i. Part of the register which records the number of times certain information keys are used

_____j. Set of numbers printed on a package to identify particular product, manufacturer, and price information when scanned by a point-of-sale cash register system

_____k. Electronic cash register system wired to a computer which provides additional information on the sales receipt; records sales, changes in inventory, and cash supply in the accounting office

1. Overring
2. Multiple pricing
3. Ledger sheet
4. Underring
5. Touch method
6. Universal Product Code
7. Change fund
8. Scanner
9. Activity counter
10. Operating crank
11. Point-of-sale system

2. Label the parts of the cash register by writing the correct names in the blanks provided.



3. State three advantages of using the touch method of checking.

   a.

   b.

   c.

4. Describe the position of the hand when resting on the home-base keys.

5. Distinguish between the finger positions for numbers using one cash register key by placing a "T" in front of the amounts which would be punched by the thumb and an "I" in front of those punched by the index finger.

_____a. $1.00

_____b. 70¢

_____c. 40¢

_____d. 30¢

_____e. 2¢

_____f. 4¢

_____g. $2.00

_____h. 3¢

_____i. 6¢

_____j. 10¢

_____k. $8.00

6. Distinguish between the finger positions for numbers using more than one cash register key. Place the letters "IM" in front of the amounts punched by the index and middle fingers, a "T" in front of those amounts punched by the thumb, and a "TI" in front of those amounts punched by the thumb and index fingers.

_____a. $2.20

_____b. 33¢

_____c. 67¢

_____d. $3.20

_____e. 88¢

_____f. $2.30

_____g. 77¢

_____h. $3.40

_____i. $6.50

_____j. 66¢

_____k. 11¢

_____l. $1.30

_____m. $1.40

_____n. 57¢

_____o. 49¢

_____p. $7.80

7. List the finger positions for department keys.

a.

b.

8. Discuss the reasons for having the manager periodically remove excess money from the cash drawer.

9. State the amount of money a checker can pay out without the manager's approval.

10. Discuss the procedure for handling underrings.

11. Discuss the procedure for handling overrings on nonsubtracting cash register.

12. Discuss the procedure for handling overrings on registers with a VOID or REFUND key.

13. State the procedure for handling department errors, refunds, and adjustments.

14. State two reasons for recording sales immediately.

    a.

    b.

15. Discuss the procedure for handling multiple priced merchandise.

16. Solve the following problem related to multiple pricing policy.

    Randy Romantic wanted to send his girlfriends long-stemmed roses. He decided to send one rose to Aletha, two roses to Bertha and a half dozen roses to Kathy. Roses cost $15.95 per dozen. What will Randy's florist bill be this month?

17. Discuss the precautions which should be taken when handling coupons.

18. Discuss the procedure for handling food stamps, relief, and/or welfare orders.

19. State the reasons for using the correct size of sack.

    a.

    b.

20. List the activities which the checker should complete before operating the register.

    a.

    b.

    c.

21. List the steps for counting the change fund.

    a.

    b.

    c.

    d.

    e.

22. Discuss the proper method for arranging coins, bills, checks, and coupons in the cash drawer.

23. Select from the list below proper checkstand procedures by placing an "X" in the blanks provided.

______a. Smile and greet each customer

______b. Call aloud each price in a clear distinct voice

______c. Ask the customer if he/she needs anything else before ringing up the total

______d. Conduct lengthy personal conversations with customers and fellow employees

______e. Place money immediately into the cash drawer before making change

______f. Place the customer's receipt with the merchandise or in the customer's hand

______g. Determine store policy about where to keep the cash register key

______h. Lump sales together

______i. Wrap merchandise before completing register transactions

______j. Thank the customer for shopping in your business

______k. Replace the tapes when colored streaks appear on the paper

24. Discuss the proper way to handle customer complaints.

25. Discuss the precautions for preventing theft from the cash register.

26. Complete training station checklist.

27. Demonstrate the ability to:

    a. Use the touch method.

    b. Check and bag merchandise.

(NOTE: If activities 26 and 27 have not been accomplished prior to the test, ask your instructor when they should be completed.)

CASH REGISTER
UNIT III

ANSWERS TO TEST

1. a. 3
   b. 4
   c. 1
   d. 2
   e. 10
   f. 7
   g. 5
   h. 8
   i. 9
   j. 6
   k. 11

2. a. Transaction indication
   b. Amount indication
   c. Key release lever
   d. Classification keys
   e. Operating motor bar
   f. Amount keys
   g. Coin slab
   h. Cash drawer
   i. Transaction printing on audit strip

3. Any three of the following:
   a. Increases speed
   b. Allows merchandise to be handled more carefully
   c. Makes it easier to watch prices
   d. Causes less frustration and fatigue
   e. Reduces error frequency by 46%
   f. Reduces net dollar loss by 48%
   g. Allows checker to face customers

4. Description should include:
   - a. Thumb on the 20¢ key
   - b. Index finger on the 50¢ key
   - c. Middle finger on the 7¢ key
   - d. Side of hand or little finger on the operating motor bar

5. a. T
   b. I
   c. I
   d. T
   e. T
   f. I
   g. T
   h. T
   i. I
   j. T
   k. I

6. a. T
   b. T
   c. IM
   d. TI
   e. IM
   f. TI
   g. IM
   h. TI
   i. IM
   j. IM
   k. T
   l. TI
   m. TI
   n. TI
   o. TI
   p. IM

7. a. Use the middle finger for department keys on the right side of the keyboard
   b. Use the thumb for the department keys on the left side of the keyboard

8. Discussion should include:
   - a. Eliminates the chance of money falling out of a full change drawer
   - b. Reduces money in the cash drawer in case of robbery
   - c. Keeps other checkers from running low on change

9. $1.00

10. Discussion should include:
    - a. Ring the item again for the amount necessary to bring it up to the correct price
    - b. Circle at once with an ink pen the two rings on the tape receipt
    - c. Explain the mistake to the customer

11. Discussion should include:

    a. Ring the item again for the correct price.

    b. Enter the entire amount of the item overrung, the department, and the sales tax on the ledger sheet in ink

    c. Collect the total amount shown on the tape and pay the customer the amount of the overring if the store gives cash refund

    d. Show the transaction on the receipt tape if the store subtracts the amount of the error from the total amount of money collected

12. Discussion should include:

    a. Ring the wrong amount again while pushing the VOID or REFUND key which will automatically subtract the wrong amount

    b. Ring the correct amount

    c. Enter the error on the ledger sheet

13. Need to be recorded on the ledger only

14. Any two of the following:

    a. Checker could forget to ring up money left for merchandise already taken

    b. Merchandise could easily be rung up to the wrong department

    c. Checker could look suspicious

15. Discussion should include:

    a. Turn all items price side up

        1. Many items look alike but have different prices

        2. Prices may be confused because of similar can sizes

    b. Set aside all multiple priced items until the checker can see if the entire multiple priced group is being purchased

    c. Remind customer that he/she can save money by purchasing the entire multiple priced group

16. $11.97

17. Discussion should include:
    - a. Use only at the time merchandise is purchased
    - b. Verify the expiration dates
    - c. Are invalid unless the product is purchased
18. Discussion should include:
    - a. Detach stamps from the original booklet in the presence of the checker
    - b. Do not use for bottle deposits, tobacco, and alcoholic beverages
    - c. Ask for identification
    - d. Give scrip or unendorsed coupons for change instead of money
    - e. Do not make it obvious to other customers that you are helping a customer on a government assistance program
19. a. Larger sacks are costly to the store and encourage shoplifting
    - b. Sacks which are too small will tear and lose customer goodwill
20. a. Check daily price changes
    - b. Check the supply of tapes in the register
    - c. Do not allow displays to hide the register
21. a. Keep a cardboard cover the size of the bill compartment of the cash drawer in a convenient place
    - b. Place the carboard over the bill compartment of the cash drawer
    - c. Empty the coins onto the cardboard
    - d. Count the coins one denomination at a time as they are placed in the proper compartment
    - e. Total the amount of the coins and currency on the back of the "No Sale" receipt which was issued when you recorded "No Sale" to open the cash drawer
22. Discussion should include:
    - a. Place all bills facing the same way
        - 1) Prevents mistakes
        - 2) Saves time arranging money to send to the bank.

b. Arrange the money from right to left with the smaller bills and coins on the right

c. Keep checks, coupons, and large bills tied together with a rubber band or paper clip and place them under the change drawer

d. Wrinkle new bills so they will not stick together

23. a, b, c, f, g, j, k

24. Discussion should include:

a. Listen

b. Apologize for any inconvenience

c. Let the customer know you understand the problem

d. Do not argue

e. Thank the customer for calling the matter to your attention

f. Explain that individual items may vary in price but that overall prices are about equal

g. Avoid contradicting a customer's statement but emphasize your store's positive qualities and services

h. Call the manager in situations that you cannot handle

25. Discussion should include:

a. Never invite customers behind the counter where the register is located

b. Open the register only while ringing up a sale

c. Never be distracted or bend over with the cash drawer open

d. Close drawers before wrapping merchandise

e. Lock registers when not in use

26. Evaluated to the satisfaction of the teacher-coordinator

27. Performance skills evaluated to the satisfaction of the teacher-coordinator

SHOPLIFTING PREVENTION
UNIT IV

UNIT OBJECTIVE

After completion of this unit, the student should be able to assist in the reduction of stealing in retail stores. The student should be able to explain in writing the emotional side of shoplifting; to cooperate in controlling the problem of external theft through recognition of how the shoplifter steals; and to explain techniques for prevention of shoplifting by both the employee and the manager. The student should be able to demonstrate the ability to interpret the shoplifting law of the state of Oklahoma. This knowledge will be evidenced through demonstration and by scoring eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with shoplifting to the correct definitions.
2. Discuss in writing the emotional side of shoplifting.
3. Describe ten types of potential shoplifters.
4. Tell the methods used by the shoplifter when stealing.
5. Discuss the times most shoplifting occurs.
6. Differentiate between the employee's responsibilities for preventing shoplifting and management's safeguards.
7. List the factors that contribute to the growth of shoplifting.
8. Demonstrate the ability to interpret the Oklahoma shoplifting law.
9. Solve problems showing the economic impact of shoplifting.
10. Write a report describing the effects of shoplifting on the community.
11. Discuss unit with employer.

SHOPLIFTING PREVENTION
UNIT IV

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

   A. Provide student with objective sheet.

   B. Provide student with information and assignment sheets.

   C. Make transparencies.

   D. Discuss unit and specific objectives.

   E. Discuss the information and assignment sheets. Ask the student to take unit to employer for discussion.

   F. Discuss the need for this kind of unit in terms of marketing.

   G. Contact resource people, such as a shoplifting specialist from the adult education center, local police department, a lawyer, a department store manager, a store security officer, or a polygraph specialist. Have students write a brief summary of the speaker's presentation, including the speaker's name and occupation.

   (NOTE: Oklahoma teachers may contact the Director of the Adult Education Center in Oklahoma City or Tulsa about conducting a shoplifting prevention seminar for DE training station sponsors and other business people.)

   H. Arrange to have the posters displayed in school and in training stations. The teacher-coordinator could arrange to have employers and art teachers judge the posters.

   I. Order films.

   J. Give test.

II. Student:

   A. Read objective sheet.

   B. Study information sheet.

   C. Complete each assignment.

   D. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Transparency masters

      1. TM 1--Shoplifting Is Stealing!

      2. TM 2--Shoplifting Detection Guide

      3. TM 3--Shoplifting Is a Crime

   D. Assignment sheets

      1. Assignment Sheet #1--Psychology of Shoplifting

      2. Assignment Sheet #2--Prevention of Shoplifting

      3. Assignment Sheet #3--Oklahoma Shoplifting Law

      4. Assignment Sheet #4--Economic Impact of Shoplifting

      5. Assignment Sheet #5--Effects of Shoplifting on Your Community

      6. Assignment Sheet #6--Discuss Unit with Your Employer

   E. Answers to assignment sheets

   F. Test

   G. Answers to test

II. References:

   A. Curtis, Bob. *Security Control: External Theft.* New York: Chain Stores Publishers Corporation, 1971.

   B. Rudnitsky, Charles, and Wolff, Leslie M. *How to Stop Pilferage in Business and Industry.* New York: Pilot Books, 1961.

   C. *A Brief Guide to Electronic Security Alarm Systems.* Ohio Distributive Education Services, 1974.

D. Mallengly, Jon. *Training for Self-Service Stores Manual.* Ohio D.E. Materials Laboratory. 1885 Neil Avenue, 115 Townshend Hall, Columbus, Ohio 43210. See Section V, p. 35.

III. Films

A. "Rip-Off." Available from Safeway District Office, 400 N.E. 36th, Oklahoma City, Oklahoma 73100.

This film deals with shoplifting in a grocery store.

B. "Who, Me?" Available from T.G.& Y, 3815 North Santa Fe, Oklahoma City, Oklahoma 73100.

This film runs fourteen minutes and covers the need for following established procedures in order to minimize loss.

C. "Caught." Available from National Retail Merchants Association, Book Order Department, 100 West 31st Street, New York, NY 10001.

This film deals with shoplifting in a department store. Use the companion pamphlet "Shoplifting Is Stealing" and the case study "Teen-age Shoplifting," both available from National Retail Merchants Association.

D. "Shoplifting." Available from ACI Films, Inc.; 35 West 45th Street; New York, New York 10036.

IV. Additional materials

A. Astor, Saul D. *Security and Loss Prevention.* Management Safeguards Insurance, 347 Fifth Avenue, New York, NY 10016.

B. "Employee's Role in Theft Reduction," 1971. Available from Vocational Education Media Center, Clemson University, Clemson, South Carolina 29631.

Forty-seven slides with script emphasize the need for the employee to use effective security practices.

SHOPLIFTING PREVENTION
UNIT IV

INFORMATION SHEET

I. Terms and definitions

A. External theft--Customer theft of merchandise, usually called shoplifting or boosting

B. Shoplifting--Stealing of merchandise, most often directly from the selling floor; a crime punishable by law

(NOTE: Pilferage refers to a customer stealing in small quantities from hotels, restaurants, and service businesses.)

C. Internal theft--Breach of faith by dishonest employees who steal goods or money from employers

(NOTE: Embezzlement refers to theft of money.)

D. Repercussion--Effect of an act or action

E. Remorse--Sense of distress arising from guilt for past wrongs

F. Kleptomaniac--Person who has a persistent neurotic impulse to steal

G. Shoplifting prevention detector--Installation used to prevent or detect shoplifters

H. Felony--Crime involving serious punishment

I. Misdemeanor--Crime involving less serious punishment than a felony

J. Surveillance--Close watch kept over a person or group; vigilance

K. Impulse--Sudden action without much thinking

L. Permissive--Action which is allowed or tolerated by some groups

M. Resentment--Unpleasant feeling about something that is wrong

N. Larceny--Stealing; theft

O. Petit larceny--Stealing items valued below an amount set by law

INFORMATION SHEET

II. Emotional side of shoplifting (Transparency 1, Assignment Sheet #1)

A. Shoplifter

1. Motivations

    a. Need

        1) Basics

        2) Luxuries

    b. For "fun" or to be part of the "in" group

    c. Store "owes" it to him; feels an inner resentment toward company

    d. Cannot find a salesperson

    e. On dare or impulse

    f. Just to see if he can get away with it

    g. Cannot pass up the chance to get something for nothing

    h. Add excitement to his life

    i. Cannot resist it

    j. Desire for attention

    k. Threat from others

2. Feelings

    a. Excitement

    b. Fear of being caught

        1) Repercussions from family, friends, others

        2) Legal repercussions

    c. Remorse--Need to make up for wrongdoing

    d. Restitution--Need to return the items to the rightful owner or pay their full value

INFORMATION SHEET

B. Society

  1. Some segments consider shoplifting as socially acceptable

  2. Public is not aware shoplifting costs the honest customer

     (NOTE: Losses resulting from external and internal theft amount to $137 per year for each citizen.)

  3. Contact between owner and customer is lost; feeling that no one person is being hurt by the theft

  4. Increase in shoplifting represents moral breakdown

     a) Permissive attitudes towards discipline

     b) Lack of respect for rights of others

     c) Attitude of "it's OK if you can get away with it"

III. Types of potential shoplifters

A. Juvenile

  1. Is a nuisance

  2. Takes candy, small toys, and inexpensive items

  3. Is inclined toward deviltry

  4. Should be served quickly to get him out of the store

  5. Makes up eighty to ninety percent of shoplifters; steals ten percent of dollar value

B. Thrill-seeker

  1. Steals for thrill of the risk; does not involve need

  2. Wants to "show off" or takes [illegible] dare

  3. Requires extra watching by sto[illegible] personnel

C. Person of limited means

  1. Needs something for family or home

  2. Cannot afford beautiful things

  3. Represents small number of thieves

INFORMATION SHEET

D. Kleptomaniac

1. Steals because of mental illness
2. Feels cheated and wants to get even
3. Is careful in preparing for theft
4. Is often member of well-to-do family
5. Needs psychiatric care not criminal action

E. Professional

1. Steals for profit
2. Is difficult to detect because he is confident
3. Takes expensive merchandise to be resold through receiver of stolen goods called a "fence"
4. Makes up ten to twenty percent of shoplifters; steals ninety percent in dollar value

F. Team

1. One person talks to the salesperson
2. Second person steals merchandise
3. Juveniles often work in teams

G. "Tipsy" customer

1. Acts as if he is drunk, dazed, or ill
2. Staggers near counter and picks up goods

H. "Refund" racket

1. Returns stolen goods to store for a refund
2. Presents sales check found on floor

I. Housewife

1. Steals low priced merchandise
2. Is difficult to control because stolen goods are concealed on her person
3. Threatens law suit if attempt is made to search her

INFORMATION SHEET

J. Drug addict
    1. Needs cash to purchase drugs
    2. Enters store with a group
    3. Steals anything but prefers high cost items

IV. Methods shoplifter uses to steal merchandise (Transparency 2)

(NOTE: Methods of concealment are often called tools.)

A. Palming
    1. Conceals small items in hand
    2. Drops object into inside pockets in clothes

B. Mingling with crowds
    1. Mixes among other shoppers
    2. Approaches busy counters undetected
    3. Does not like to be greeted by salespersons

C. Handling several items at one time
    1. Appears to be making a choice
    2. Secrets one or more items in container

D. Using the dressing rooms
    1. Takes several garments to dressing room
    2. Puts on all garments
    3. Wears garments out of store

E. Running
    1. Grabs item
    2. Leaves store quickly

INFORMATION SHEET

V. Times most shoplifting occurs

  A. Time of day

  (NOTE: Shoplifters hit when the salespeople are least attentive.)

    1. Early morning
    2. Noon
    3. Before closing

  B. Time of year

    1. Christmas
    2. Back-to-school time

VI. Ways to prevent shoplifting (Assignment Sheet #2)

(NOTE: The employee is actually the heart of prevention.)

  A. Employee's responsibilities

    1. Practice good sales techniques
      a. Greet customers promptly and professionally
      b. Do not leave department unattended
      c. Wrap packages properly
      d. Destroy sales slips left on the counter and floor
    2. Know the merchandise
      a. Know the prices, do not allow switching
      b. Know what merchandise the customer takes into dressing rooms
      c. Check merchandise for hidden items at time of sale by opening boxes and running hands over folded items
    3. Be observant
      a. Keep your eyes on sales floor and customers
      b. Notice what people bring into the department

INFORMATION SHEET

- c. Fold and/or staple the tops of sacks
- d. Know the enemies and how they work

4. Learn your store policies

B. Management's safeguards

1. Train employees
2. Plan store layout carefully
    - a. Avoid cluttered and high shelves and displays
    - b. Keep departments well-lighted
    - c. Do not place displays near doors
    - d. Display expensive merchandise in locked showcases
    - e. Rotate merchandise location

      (NOTE: Clothing stores with movable racks often use this method.)
3. Use wide angle mirrors
4. Employ security personnel

   Example: Security personnel who are uniformed or who wear plain clothes
5. Install shoplifting prevention detectors
6. Prosecute shoplifters
7. Reward employees for being alert to potential thieves
8. Post store policies and warnings about shoplifting

VII. Factors that contribute to growth of shoplifting

A. Increase in number of self-service stores

B. Display techniques making merchandise more available to shoppers

C. Fewer family-owned stores

(NOTE: Customer cannot relate to large corporations.)

D. High prices

(NOTE: People feel companies are making too much profit.)

INFORMATION SHEET

E. Not enough trained employees

F. Lenient attitude of store toward prosecution

G. Difficulty in obtaining enough proof to stop suspects

H. Lower morals, attitudes, ethics, and standards

VIII. Shoplifting law of Oklahoma (Transparency 3, Assignment Sheet #3)

A. Shoplifting is said to take place whenever merchandise is concealed

Example: Placing merchandise in a pocket

B. When the total value of the merchandise stolen totals $20.00 or more, the crime changes from a misdemeanor to a felony with increased punishment and a more damaging criminal record

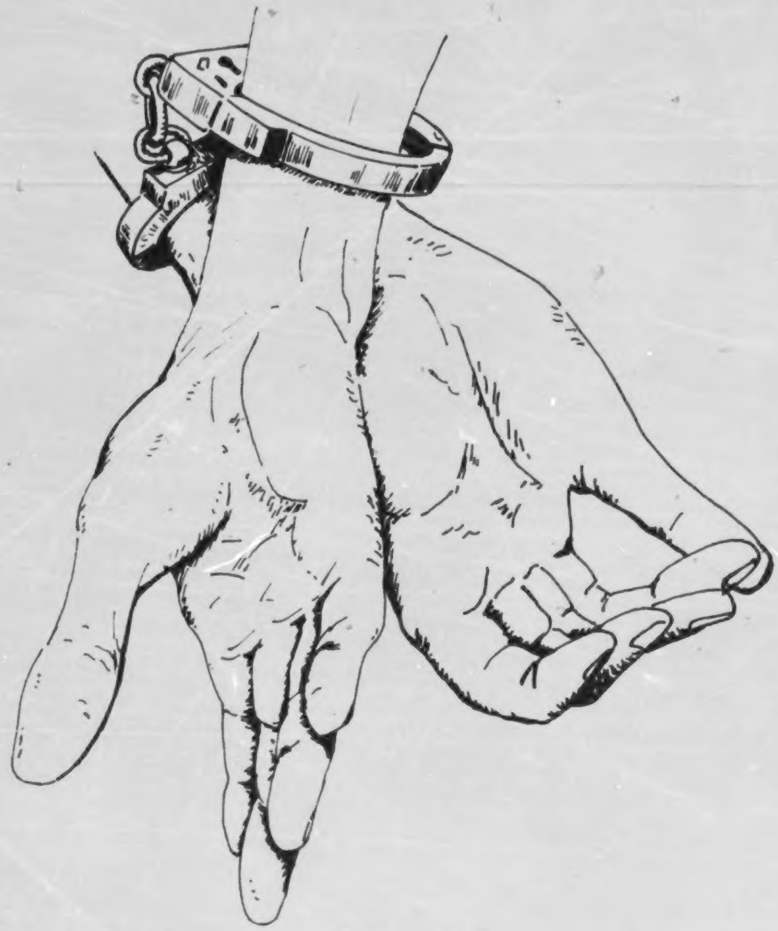
C. Suspected shoplifter may legally be detained and searched

(NOTE: This may take place either inside or outside the store, but caution should be taken not to slander or falsely accuse the suspect.)

Shoplifting Is Stealing!

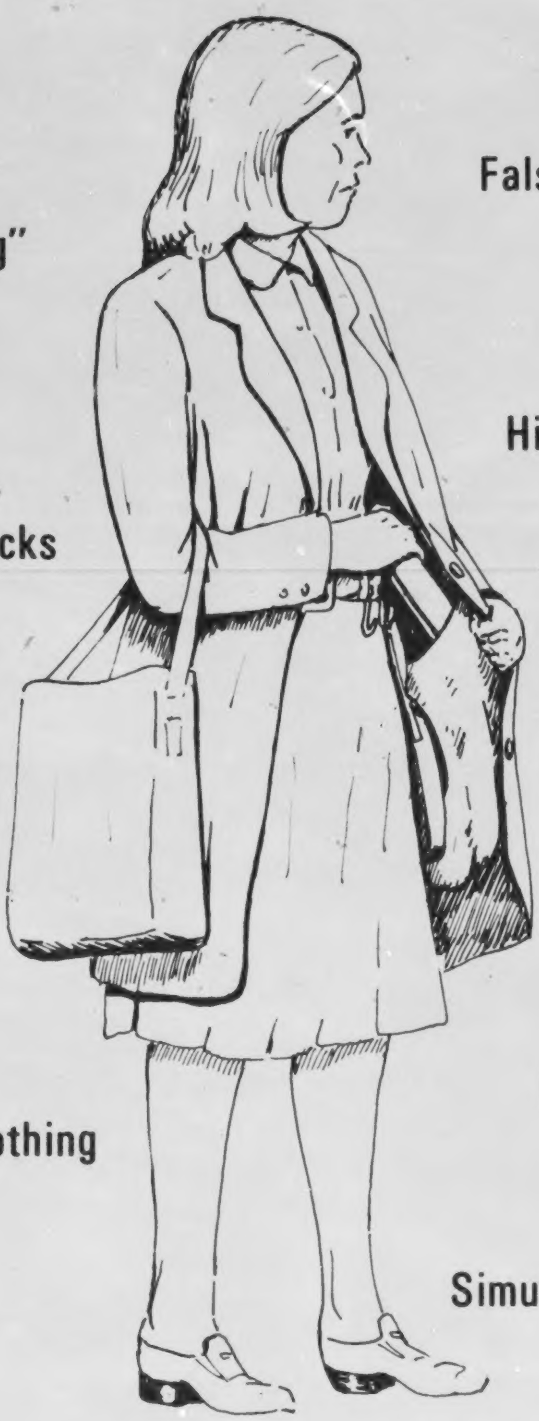
If I Shoplift,

I Am A Thief!



DE II - 177-B

Shoplifting Detection Guide



"Palming"

Purses, Bags,
and Backpacks

Full Skirts

Oversized Clothing

False Sleeves

Hidden Pockets

Hooks

Boxes

Folded Papers
or Magazines

Simulated Pregnancy

Shoplifting Is A Crime

Petit Larceny, Misdeameanor,
Theft of Less Than $20,
Punishable by Fine
$10-100 and/or
Up to 30 Days
in Jail;

Grand Larceny, Felony
Punishable by Up to 5
Years Imprisonment;

"John Doe, shoplifting,
guilty plea, fined $50
plus costs;"

"Sue Roe, shoplifting,
plea of not guilty,
trial March 30;"

TM 3

SHOPLIFTING PREVENTION
UNIT IV

ASSIGNMENT SHEET #1--PSYCHOLOGY OF SHOPLIFTING

A young woman told this story about shoplifting during an interview with a newspaper reporter.

"I didn't try to rip anything off. (The thing they got me for was a bottle of nail polish.) I just went in to buy an album but they didn't have the record I wanted so I kinda looked around the makeup and stuff. So I started out to the car to get some change - cause it was silly to write a check for nail polish. When I started out the door, a buzzer sounded - I guess 'cuz I had the polish in my hand. Somebody kept saying, "Did you forget to pay for something?" Then they arrested me. I didn't tell my folks. My mom, well, you know. I just couldn't explain to her. My boyfriend couldn't believe I was arrested. Everybody makes jokes about it like, "Wow, a dollar, couldn't you afford that?" My friends don't think I meant to steal anything. Well, people think merchants rip them off all the time, so why shouldn't they rip merchants off too?"

OK. After reading the story, write a paragraph discussing why you believe the girl acted the way she did about taking the polish out of the store. Why do you think she couldn't tell her folks but did tell her boyfriend? How do you think she felt afterwards?

You will be graded on spelling, grammar, and how clearly you express your ideas.

SHOPLIFTING PREVENTION
UNIT IV

ASSIGNMENT SHEET #2--PREVENTION OF SHOPLIFTING

As a part of a community anti-shoplifting campaign, you have been asked to prepare anti-shoplifting posters and pamphlets. Distribute these to grade schools and employers. Here is the information you will need.

THEME:	Shoplifting: Prevention/Consequences
PURPOSE:	To give you an opportunity to show employers a practical application of classroom instruction
CRITERIA:	Originality; Neatness; Impact (Will the poster influence people not to shoplift?)
SIZE & MATERIALS:	18" x 24"--Use anything the teacher can supply or that you can bring from home

SHOPLIFTING PREVENTION
UNIT IV

ASSIGNMENT SHEET #3--OKLAHOMA SHOPLIFTING LAW

The DE teacher-coordinator will divide the class into groups of two. After class discussion of the law given below, the groups will present role-playing situations in which one person represents the apprehended shoplifter and the other the law enforcement officer.

The "shoplifter" will attempt to explain why he stole merchandise and the "officer" will explain the legal penalties for the crime.

TITLE 22 SECTION 1343-1344

Larceny of merchandise held for sale in retail or wholesale establishments:

SECTION 1. Larceny of merchandise held for sale in retail or wholesale establishments shall be punishable as follows:

(A) First offense filed in State Courts

For the first conviction, in the event the value of the goods, edible meat or other corporeal property which has been so taken is less than Twenty Dollars ($20.00), punishment shall be by imprisonment in the county jail not exceeding thirty (30) days, and by a fine not less than Ten Dollars ($10.00) nor more than One Hundred Dollars ($100.00).

(B) Second offense after being convicted once before

If it be shown, in the trial of a case in which the value of the GOODS, edible meat or other corporeal property is less than Twenty Dollars ($20.00), that the defendant has been once before convicted of the same offense, he shall, on his second conviction, be punished by confinement in the county jail for not less than thirty (30) days nor more than one (1) year, and by a fine not exceeding One Thousand Dollars ($1,000.00).

(C) Third offense after being convicted twice before

If it be shown, upon the trial of a case where the value of the goods, edible meat or other corporeal personal property is less than Twenty Dollars ($20.00), that the defendant has two or more times before been convicted of the same offense, regardless of the value of the goods, edible meat or other corporeal personal property involved in the first two convictions, upon the third or any subsequent conviction, the punishment shall be by confinement in the penitentiary for not less than two (2) nor more than five (5) years.

ASSIGNMENT SHEET #3

(D) In the event the value of the goods, edible meat or other corporeal property is Twenty Dollars ($20.00), or more, punishment shall be by confinement in the penitentiary for not less than one (1) year not more than five (5) years.

Passed into law on the 8th day of May 1967

SECTION 2. Any merchant, his agent or employee, who has reasonable grounds or probable cause to believe that a person has committed a wrongful taking of merchandise or money from a mercantile establishment, may detain such person in a reasonable manner for a reasonable length of time for all or any of the following purposes:

(A) Conducting an investigation, including reasonable interrogation of the detained person, as to whether there has been a wrongful taking of such merchandise or money;

(B) Informing the police or other law enforcement officials of the facts relevant to such detention;

(C) Performing a reasonable search of the detained person and his belongings when it appears that the merchandise or money may otherwise be lost; and

(D) Recovering the merchandise or money believed to have been taken wrongfully. Any such reasonable detention shall not constitute an unlawful arrest or detention, nor shall it render the merchant, his agent or employee, criminally or civilly liable to the person so detained

SECTION 3. Any person concealing unpurchased merchandise of any mercantile establishment, either on the premises or outside of the premises of such establishment, shall be presumed to have so concealed such merchandise with the intention of committing a wrongful taking of such merchandise within the meaning of Section 1341 of this Title, and such concealment or the finding of such unpurchased merchandise concealed upon the person or among the belongings of such person shall be conclusive evidence of reasonable grounds and probable cause for the detention in a reasonable manner and for a reasonable length of time, of such person by a merchant, his agent or employee, and any such reasonable detention shall not be deemed to be unlawful, nor render such merchant, his agent or employee criminally or civilly liable.

Passed into Law on the 2nd day of May, 1967.

SHOPLIFTING PREVENTION
UNIT IV

ASSIGNMENT SHEET #4--ECONOMIC IMPACT OF SHOPLIFTING

Grocery stores usually operate on a 1% profit margin. This means if $1.00 is stolen it takes $100.00 to replace the loss. Department stores usually operate on about 3%. In some areas as many as one out of seven people shoplift. Businessmen make up for their losses by increasing retail prices, hiring fewer people, and not giving salary increases. The five problems below will help illustrate the meaning of these facts and show how shoplifting affects business.

1. Your store operates on a 2 percent margin of profit. Merchandise valued at $150.00 is taken by shoplifters in one day. How much merchandise does the store have to sell in order to make up for that $150.00 loss?

2. In many areas one out of seven customers will shoplift. If there are 350 customers in the store in one day, how many of these might be shoplifters?

3. The average value of the shoplifter's theft is $3.00. How much would the store in problem #2 lose in one day in dollar value?

ASSIGNMENT SHEET #4

4. There are approximately 300 stores in town. Each loses $150.00 a day. At one percent profit, how much will the combined 300 stores have to sell to overcome their losses?

5. In what ways can business people make up for the losses they suffer from shoplifting?

SHOPLIFTING PREVENTION
UNIT IV

ASSIGNMENT SHEET #5--EFFECTS OF SHOPLIFTING ON YOUR COMMUNITY

Shoplifting is the fastest growing form of larceny in the United States. There has been an increase of 210% in the last ten years. $3 1/2 to $4 billion is lost. In Oklahoma more than $10 million dollars a year is lost.

Since it is hard to imagine billions and millions, your teacher-coordinator will divide your class into three groups and ask you to go out into your own community to gather information about local shoplifting problems.

Follow these instructions:

1. Phone for an appointment
2. Be prepared to explain why you are doing the interview
3. Prepare questions in advance
4. Write a report to present to the class describing the effects of shoplifting on your community

Group #1

Interview employer or other businessman

Group #2

Interview law enforcement officer at police department

Group #3

Interview manager of Chamber of Commerce

SHOPLIFTING PREVENTION
UNIT IV

ASSIGNMENT SHEET #6--DISCUSS UNIT WITH YOUR EMPLOYER

Your employer is concerned with the problem of shoplifting and with training his employees to help prevent losses. He will be interested to know what you are learning in class about this subject.

Ask him to set a time when he can talk with you. Take the unit on shoplifting and go over it with him. Ask for his ideas about what you are learning. Ask him to write down his comments about the unit and to sign the assignment sheet. (A form for this is provided on the following page.) You should explain that the signature is only to show your teacher that you really did talk to him.

ASSIGNMENT SHEET #6

Employer's Comments:

____
Employer's Signature

SHOPLIFTING PREVENTION
UNIT IV

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #4

1. $7,500
2. 50
3. $150.00
4. 300 stores x $150.00 = $45,000 and @ 1% margin of profit = $4,500,000.00 in sales
5. a. Increases the price of his merchandise

   b. Cuts down on the number of employees to reduce overhead

   c. Does not give salary increases

SHOPLIFTING PREVENTION
UNIT IV

TEST

1. Match the terms on the right to the correct definitions by placing the appropriate numbers in the blanks provided.

______a. Customer theft of merchandise, usually called shoplifting or boosting

______b. Stealing of merchandise, most often directly from the selling floor; a crime punishable by law

______c. Breach of faith by dishonest employees who steal goods or money from employers

______d. Effect of an act or action

______e. Sense of distress arising from guilt for past wrongs

______f. Person who has a persistent neurotic impulse to steal

______g. Installation used to prevent or detect shoplifters

______h. Stealing items valued below an amount set by law

______i. Crime involving serious punishment

______j. Stealing; theft

______k. Crime involving less serious punishment than a felony

______l. Unpleasant feeling about something that is wrong

______m. Close watch kept over a person or group; vigilance

______n. Action which is allowed or tolerated by some groups

______o. Sudden action without much thinking

1. Remorse
2. Felony
3. Kleptomaniac
4. Misdemeanor
5. External theft
6. Impulse
7. Shoplifting
8. Surveillance
9. Repercussion
10. Permissive
11. Shoplifting prevention detector
12. Resentment
13. Internal theft
14. Larceny
15. Petit larceny

2. Discuss in a short paragraph the emotional side of shoplifting.

3. Describe the ten types of potential shoplifters as listed below.
    a. Juvenile--
    b. Thrill-seeker--
    c. Person of limited means--
    d. Kleptomaniac--
    e. Professional--
    f. Team--
    g. "Tipsy" customer--
    h. "Refund" racket--
    i. Housewife--
    j. Drug addict--

4. Tell the methods used by the shoplifter when stealing.

5. Discuss the times most shoplifting occurs.

6. Differentiate between ways to prevent shoplifting. Place an "M" in front of management's safeguards and an "E" in front of the employee's responsibilities.

______a. Plan store layout carefully

______b. Practice good sales techniques

______c. Know the merchandise and prices

______d. Use wide angle mirrors

______e. Be observant

______f. Employ security personnel

______g. Prosecute shoplifters

______h. Know what merchandise the customer takes into dressing rooms

______i. Train employees

______j. Install shoplifting prevention devices

______k. Do not leave department unattended

7. List four factors that contribute to the growth of shoplifting.

a.

b.

c.

d.

8. Demonstrate the ability to interpret the Oklahoma shoplifting law.

9. Solve problems showing the economic impact of shoplifting.

10. Write a report describing the effects of shoplifting on the community.

11. Discuss unit with employer.

(NOTE: If activities 8-11 have not been accomplished prior to the test, ask your teacher-coordinator when they should be completed.)

SHOPLIFTING PREVENTION
UNIT IV

ANSWERS TO TEST

1.
   a. 5
   b. 7
   c. 13
   d. 9
   e. 1
   f. 3
   g. 11
   h. 15
   i. 2
   j. 14
   k. 4
   l. 12
   m. 8
   n. 10
   o. 6

2. Discussion should include:
   a. Shoplifter
      1) Motivations
         a) Need
            (1) Basics
            (2) Luxuries
         b) For "fun" or to be part of the "in" group
         c) Store "owes" it to him; feels an inner resentment toward company
         d) Cannot find a salesman
         e) On dare or impulse
         f) Just to see if he can get away with it
         g) Cannot pass up chance to get something for nothing
         h) Add excitement to his life
         i) Cannot resist it
         j) Desire for attention
         k) Threat from others

2) Feelings
  a) Excitement
  b) Fear of being caught
    (1) Repercussions from family, friends, others
    (2) Legal repercussions
  c) Remorse--Need to make up for wrongdoing
  d) Restitution--Need to return the items to the rightful owner or pay their full value

b. Society
  1) Some segments consider shoplifting as socially acceptable
  2) Public is not aware shoplifting costs the honest customer
  3) Contact between owner and customer is lost; feeling that no one person is being hurt by theft
  4) Increase in shoplifting represents moral breakdown
    a) Permissive attitudes toward discipline
    b) Lack of respect for rights of others
    c) Attitude of "it's OK if you can get away with it"

3. Description should include:

a. Juvenile
  1) Is a nuisance
  2) Takes candy, small toys, and inexpensive items
  3) Is inclined toward deviltry
  4) Should be served quickly to get him out of the store
  5) Makes up eighty to ninety percent of shoplifters; steals ten percent of dollar value

b. Thrill-seeker
  1) Steals for thrill of the risk; does not involve need
  2) Wants to "show off" or takes a dare
  3) Requires extra watching by store personnel

c. Person of limited means
    1) Needs something for family or home
    2) Cannot afford beautiful things
    3) Represents small number of thieves

d. Kleptomaniac
    1) Steals because of mental illness
    2) Feels cheated and wants to get even
    3) Is careful in preparing for theft
    4) Is often member of well-to-do family
    5) Needs psychiatric care not criminal action

e. Professional
    1) Steals for profit
    2) Is difficult to detect because he is confident
    3) Takes expensive merchandise to be resold through receiver of stolen goods called a "fence"
    4) Makes up ten to twenty percent of shoplifters; steals ninety percent in dollar value

f. Team
    1) One person engages salesperson
    2) Second person steals merchandise
    3) Juveniles often work in teams

g. "Tipsy" customer
    1) Acts as if he is drunk, dazed, or ill
    2) Staggers near counter and picks up goods

h. "Refund" racket
    1) Returns stolen goods to store for refund
    2) Presents sales check found on floor

i. Housewife

  1) Steals low priced merchandise

  2) Is difficult to control because stolen goods are concealed on her person

  3) Threatens law suit if attempt is made to search her

j. Drug addict

  1) Needs cash to purchase drugs

  2) Enters store with group

  3) Steals anything but prefers high cost items

4. a. Palming

  1) Conceals small items in hand

  2) Drops object into inside pockets in clothes

b. Mingling with crowds

  1) Mixes among other shoppers

  2) Approaches busy counters undetected

  3) Does not like to be greeted by salespersons

c. Handling several items at one time

  1) Appears to be making a choice

  2) Secrets one or more items in container

d. Using the dressing rooms

  1) Takes several garments to dressing room

  2) Puts on all garments

  3) Wears garments out of store

e. Running

  1) Grabs item

  2) Leaves store quickly

5. a. Time of day
    1) Early morning
    2) Noon
    3) Before closing
   b. Time of year
    1) Christmas
    2) Back-to-school

6. a. M
   b. E
   c. E
   d. M
   e. E
   f. M
   g. M
   h. E
   i. M
   j. M
   k. E

7. Any four of the following:
   a. Increase in number of self-service stores
   b. Display techniques making merchandise more available to shoppers
   c. Fewer family-owned stores
   d. High prices
   e. Not enough trained employees
   f. Lenient attitude of stores toward prosecution
   g. Difficulty in obtaining enough proof to stop suspects
   h. Lower morals, attitudes, ethics, and standards

8. Evaluated to the satisfaction of the teacher-coordinator.

9. Evaluated to the satisfaction of the teacher-coordinator.

10. Evaluated to the satisfaction of the teacher-coordinator.

11. Evaluated to the satisfaction of the teacher-coordinator.

COMMUNICATIONS
UNIT V

UNIT OBJECTIVE

After completion of this unit, the student should be able to select from a list the factors necessary for and ways to achieve effective communication, ways to carry on casual conversation, things which should be done to give instructions and directions clearly, and rules for using the telephone correctly. He/she should also be able to discuss factors necessary for clarifying store policies and the ways to make and acknowledge introductions of yourself and others. He/she should be able to distinguish between positive and negative gestures, expressions, and stances. This knowledge will be evidenced by an overall score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with communications to the correct definitions.
2. Select from a list those factors necessary for effective communication.
3. Select from a list ways to achieve effective communication.
4. Discuss the proper way to introduce yourself.
5. Discuss the proper way to introduce others.
6. Discuss the proper way to acknowledge introductions.
7. Select from a list ways to carry on casual conversation.
8. Select from a list those things which should be done to give directions and instructions clearly.
9. Discuss the factors necessary for clarifying store policies.
10. Discuss the factors necessary for communicating product information.
11. Select from a list rules for using the telephone correctly.
12. Distinguish between positive and negative gestures, expressions, and stances.
13. Analyze voice qualities.

COMMUNICATIONS
UNIT V

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

  A. Provide student with objective sheet.

  B. Give pretest using objective sheet.

  C. Provide student with information and assignment sheets.

  D. Make transparencies.

  E. Discuss unit and specific objectives.

  F. Discuss information and assignment sheets.

  G. Provide recorder for voice analysis.

  H. Request teletrainer from Bell Telephone Company.

  (NOTE: Speakers, films, and teletraining equipment may be obtained for Oklahoma teachers from Ms. Marva Nero; Southwestern Bell; 707 North Robinson, Room 1002; Oklahoma City, Oklahoma 73126; 405-236-7395 and Ms. Alnova Dinger; Southwestern Bell; 1720 South Boulder; Tulsa, Oklahoma; 918-585-6911.)

  I. Teach basic English if necessary.

  J. Role play introductions and body language.

  K. Give test.

  L. Reteach if necessary.

  M. Test again until minimum standard is reached.

II. Student:

  A. Read objective sheet.

  B. Study information sheet.

  C. Take notes.

  D. Role play introductions, telephone techniques, and body language.

  E. Complete assignment sheets and turn in to instructor.

  F. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1--Feedback
    2. TM 2--Empathy
    3. TM 3--Good Conversation
    4. TM 4--Two-Way Conversation
    5. TM 5--Communicating
    6. TM 6--Placing a Call
    7. TM 7--Leaving Telephone Unattended

  D. Assignment sheets

    1. Assignment Sheet #1--Giving Directions and Instructions
    2. Assignment Sheet #2--Clarifying Store Policies
    3. Assignment Sheet #3--Pronouncing Words Distinctly
    4. Assignment Sheet #4--Using Proper English
    5. Assignment Sheet #5--Interpreting Body Language
    6. Assignment Sheet #6--Analyzing Voice Qualities

  E. Answers to assignment sheets

  F. Test

  G. Answers to test

II. References:

A. Roan, Anthony J. *Training and Communication.* part five. International Textbook Co., 1968.

B. Rowe, Kenneth L., and Jimerson, Hallie C. *Communications in Marketing.* Dallas, Texas: Gregg Division/McGraw-Hill Book Co., 1971.

C. *Win More Friends by Telephone.* American Telephone and Telegraph Co., 1962.

D. Buchanan, Robert D., R.D. "Communicating With Employees," *Food Service Marketing.* 37 (Sept., 1975).

E. Fast, Julius. *Body Language.* New York: Simon and Schuster, Inc., 1973.

III. Film--"Successful Persuasion." Available from National Educational Media, Inc.; 15250 Ventura Boulevard; Sherman Oaks, California 91403.

COMMUNICATIONS
UNIT V

INFORMATION SHEET

I. Terms and definitions

A. Communication--All the ways by which meaning is conveyed from one person to another

B. Feedback--Returning to the beginning source; finding out how one did

C. Empathy--Putting self in other person's position; participating in another person's feelings or ideas

D. Trade association journals--Publications printed by various nonprofit organizations to disseminate information about the industry

(NOTE: There are over 12,000 trade associations in the United States.)

E. House magazine--Magazine produced by a company to build morale among the employees

(NOTE: House magazines may feature articles on safety, public service projects, retirements, promotions, company policies, winners of sales contests, new store openings, and editorials.)

F. Bulletin board--Place where written notices and reminders may be seen easily

G. Memo--Written announcement sent to members of an organization

H. Grapevine--Informal communication system that exists in all organizations; may be helpful or harmful depending on how it is used

II. Factors necessary for effective communication

A. Feedback (Transparency 1)

B. Trust in the person sending the message

(NOTE: Real communication cannot take place if the person receiving the message feels threatened by the message or does not have confidence in the sender.)

C. Empathy (Transparency 2)

(NOTE: Most people have a tendency to judge a message from their own viewpoint.)

INFORMATION SHEET

- D. Listening

  (NOTE: Do not just think what your next reply will be while the other person is talking.)

- E. Proper timing

  (NOTE: Conversation cannot take place if the listener is interrupted, has his/her mind on other things, or if there is much interference in the background.)

III. Ways to achieve effective communication

- A. Encourage questions and participation
- B. Use examples to illustrate main ideas
- C. Use the kind of language the listener will understand

  (NOTE: Simple words are usually best.)

- D. Respect the listener

  (NOTE: If you talk down to a person, he/she will resent it; if you talk over a person's head, he/she becomes uncomfortable and suspicious.)

- E. Get to the point; do not talk too much
- F. State clearly why orders are given or why certain standards or results are expected
- G. Pay attention
- H. Make allowances for those who may have something worthwhile to say but who lack the ability or experience to express themselves well

IV. Introducing yourself

- A. Introduce yourself promptly
- B. Give first and last names
- C. State names slowly and distinctly
- D. Complete introduction by giving some information about yourself so new acquaintances may talk easily with you and remember you

  Examples: "I'm Joe Blow, a DE student from Kokanee High School."

  "I'm Sam DeMann from the hardware department, and I've been assigned to work in this section this afternoon."

- E. Repeat names during the introduction and conversation so they may be remembered correctly

INFORMATION SHEET

V. Introducing others

A. Introduce men to women

Example: "Miss Tough, this is my father. Miss Tough is my supervisor, Dad."

B. Introduce younger people to older people

Example: "Uncle Barry, I'd like to introduce you to Barbara Bronsen. My uncle, Mr. Rich, Barbara. Barbara is the secretary of our DECA chapter, Uncle Barry."

C. Introduce subordinates to superiors

Example: Mrs. Super, I'd like to present to you Mr. Greenhand who started to work in our department yesterday. Mr. Greenhand, this is Mrs. Super, head of the finance and credit department."

D. Introduce all others in any order

E. Give some additional information about the persons introduced to get a conversation started

F. Do not say, "This is my friend," for it suggests that the other person is not a friend

G. Repeat names slowly and distinctly during the introduction and conversation so they may be remembered correctly

VI. Acknowledging introductions

A. "How do you do" followed by an informal comment is always appropriate in business situations

Example: "How do you do. Harvey has told me how much you helped him, Lori."

B. Men shake hands with each other

C. Women may shake hands with each other

(NOTE: In the past women have not shaken hands as much as men. However, the practice of women offering to shake hands is increasing.)

D. Men should not shake hands with women unless the women make the first move

E. Handshakes should be firm but not crushing

(NOTE: Two casual pumps of the hands should be adequate.)

INFORMATION SHEET

VII. Carrying on casual conversation

A. Ask questions to discover other person's interests (Transparency 3)

Examples: Sports, family, job

B. Avoid controversial subjects such as religion and politics

C. Avoid repeating annoying words and phrases

Examples: "And, uh . . ." and "You know"

D. Do not monopolize the conversation (Transparency 4)

(NOTE: A rule of thumb is not to talk more than one minute without giving someone else an opportunity to participate.)

E. Be a good listener and people will think you are a great conversationalist

F. Do not call an older person by his/her first name unless he/she gives permission

(NOTE: "Sir" may be substituted for a man's name, but "ma'am" may not be properly substituted for a woman's name in some parts of the country.)

G. Follow single word answers like "yes" and "no" with the person's name and a simple statement to make the reply sound friendly and not curt

H. Say friendly phrases, such as "Good Morning," automatically

(NOTE: Such phrases whether or not an answer is given are appropriate in business.)

I. Avoid using your hands too much while talking

VIII. Giving directions and instructions clearly (Assignment Sheet #1)

A. Concentrate on all the steps to be followed before speaking

(NOTE: Avoid confusing directions, such as "To get to the shoe department you turn, let's see, left or right? Turn left. . . no, turn right. That's it, you turn right at the bottom of the stairs.")

B. Present the steps clearly and in proper order

Example: "To wash the sweater, use lukewarm water and mild soap. Let the sweater soak about 10 minutes. Squeeze, don't wring, the water from the sweater. Rinse until the water is clear. Then roll the sweater in a towel to blot the excess moisture. Lay it flat on dry towels in the shade to dry."

INFORMATION SHEET

C. Avoid details that do not add to the main point

D. Give clues so the person will know when he/she is following the right directions or instructions

Example: "When you see the large orange and black water tower on the right side of the road, you will be half way there."

IX. Clarifying store policies (Assignment Sheet #2)

A. Be polite

B. State the policy clearly

C. Give the reason for the policy when appropriate

D. Offer an alternative solution

Examples: "Excuse me, sir. I'm sorry, but our manager has asked that we request our customers to cooperate with the no smoking policy because of fire regulations and the federal law prohibiting smoking in public places. However, it is alright to smoke in the areas where there are ash cans. Thanks so much."

"You are welcome to use these footlets while trying on shoes. For all our customers' health, we require everyone to wear some kind of foot covering."

X. Communicating product information (Transparency 5, Assignment Sheets #3 and #4)

A. Avoid meaningless, trite phrases

(NOTE: Do not assume everyone understands what is meant by common words. Be as specific as possible.)

Examples: Great, fine, nice, bad, cheap

B. Avoid slang

Examples: Honey, dearie

C. Pronounce words distinctly

Examples: Wasjuhavimmind? (What did you have in mind?)
Weryasit (Where is it?)

D. Be sure terms are interpreted the same way by both the salesperson and the customer

Examples: Satisfaction guaranteed, clearance, a brand name, best buy

E. Use proper English

INFORMATION SHEET

XI. Using the telephone correctly (Transparency 6)

(NOTE: Remember when you are on a business telephone, you represent the entire business.)

A. Answer promptly

(NOTE: When calling, allow the telephone to ring ten times or for one minute before hanging up.)

B. Use a pleasant voice

1. Visualize the person on the other end of the line

2. Smile while you talk

(NOTE: Smiling will cause your voice to sound friendlier and less flat.)

C. Identify yourself

Examples: "Home furnishings department, Ms. Beanbag."

"Sharp's and Flat's Music Store. This is Mr. Bach."

D. Do not say "speaking" after your name because what is said last will be what the other party hears best

(NOTE: At home only say "Hello" or "Smith's residence." Be cautious about giving definite information to strangers.)

E. Use the customer's name often

F. Speak distinctly into the receiver

(NOTE: A telephone is made to pick up a normal pitch at about an inch from the mouth.)

G. Be friendly

1. Do not ask who is calling

(NOTE: Certain policies may vary with the business.)

2. Ask "Will you hold or shall I call you back?" when you must leave the line to get information

3. Check back frequently to assure the customer he/she has not been forgotten if it becomes necessary to leave the telephone for long periods of time

INFORMATION SHEET

4. Attract attention before resuming the call

   Example: "Mrs. Bull? Thank you for waiting."

5. Apologize for errors or delays

H. Use correct method when leaving telephone unattended (Transparency 7)

(NOTE: A telephone receiver will pick up sound for 10-12 feet.)

1. Press the hold button to cut out noisy distractions

2. Lay the receiver flat if the telephone does not have a hold button

3. Lay the receiver against the side of a wall telephone

I. Tell the customer why a call is being transferred

Example: "Let me transfer you to extension 263, the home furnishings department. They will be able to answer your questions."

J. Mention the number to which a transfer is being made in case the call is disconnected

K. Write down points to be covered and questions to be asked before placing a call

L. State, "This is long distance," when calling long distance directly

(NOTE: Consequently, the party who answers should not keep you waiting for a long period.)

M. Replace the telephone receiver easily

(NOTE: The person making the call should hang up first.)

XII. Body language (Assignment Sheet #5)

A. Positive gestures, expressions, and stances

(NOTE: Movements of the body help us express ourselves to others. Our posture often communicates our true feelings better than words. It should be remembered, however, that body language is a general indicator. A single gesture should not be considered by itself, in only a single situation, or separate from the words spoken. This list is not meant to be conclusive.)

1. Open palms--Open, friendly (Figure 1)

INFORMATION SHEET

2. Hands on hips--Aggressive (Figure 1)

   (NOTE: Football players are often seen standing this way along the sidelines.)

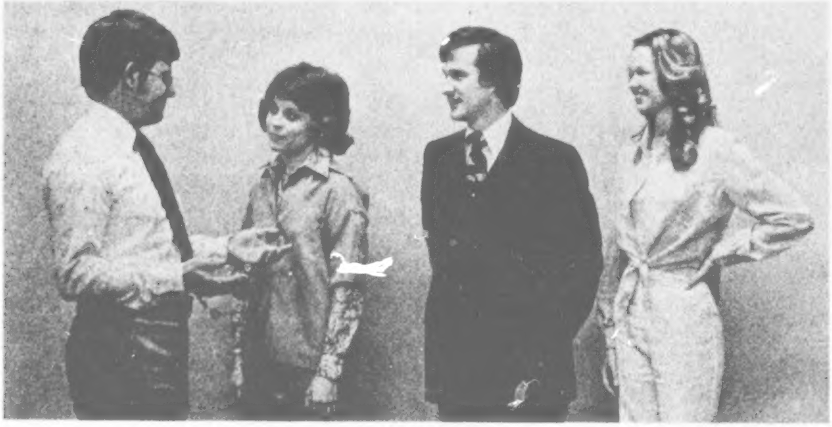
3. Hands clasped behind back--Thinking, listening, contemplating, concentrating, meditating (Figure 1)

   (NOTE: Winston Churchill is often pictured this way.)

4. Head held high--Complete control (Figure 1)

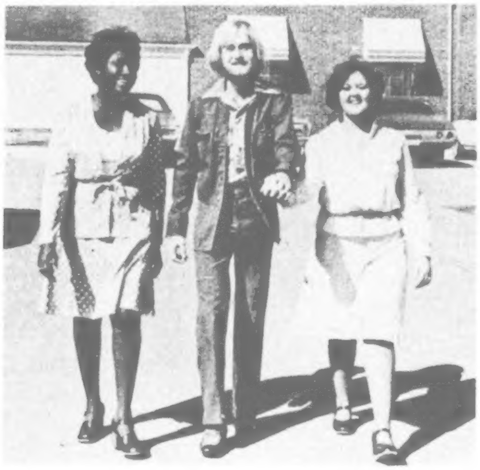
5. Arms hanging loosely, straight at sides--Collected, poised (Figure 1)

FIGURE 1



6. Arms swinging freely when walking--Cheerful (Figure 2)

FIGURE 2



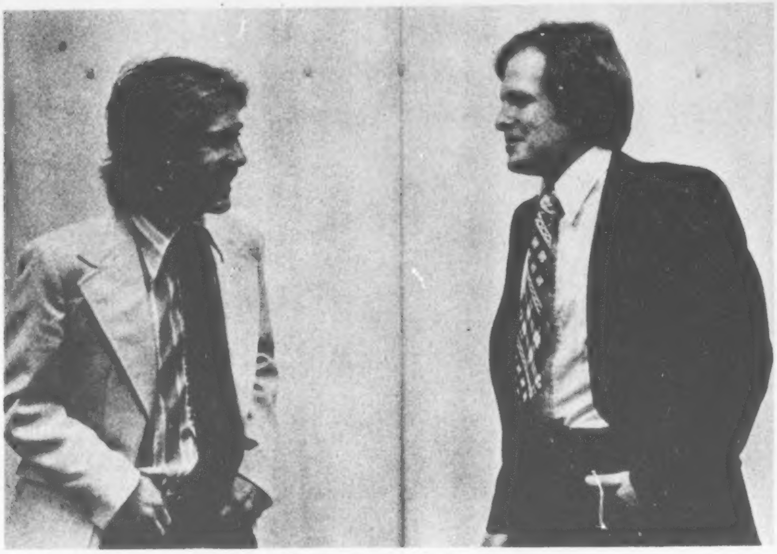
INFORMATION SHEET

7. Fingers tucked under belt--Confident, cool (Figure 3)

8. Hand in one pocket--Calm (Figure 3)

9. Coat unbuttoned--Open, friendly (Figure 3)

FIGURE 3



10. Sitting with feet flat on the floor--Poised (Figure 4)

11. Sitting with leg crossed at the ankle (men)--Competitive (Figure 4)

    (NOTE: Crossing legs at the knees is more common in Europe.)

12. Sitting slightly forward in chair--Attentive (Figure 4)

13. Hands laying quietly on thighs or arms of chair--At ease (Figure 4)

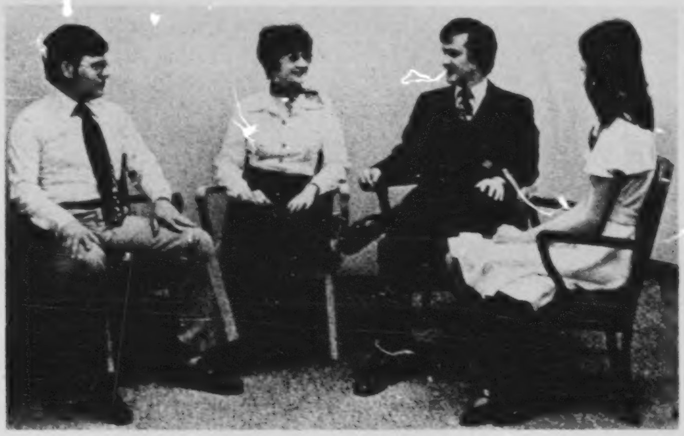
14. Knees together (women)--Modest (Figure 4)

15. Legs crossed at the ankles with hands in middle of lap or to the opposite side from the legs (women)--Graceful (Figure 4)

INFORMATION SHEET

16. Legs back under chair (women)--Poised, graceful silhouette (Figure 4)

FIGURE 4



17. Arms crossed loosely at lower part of chest--Relaxed (Figure 5)

18. Smiling--Pleasant (Figure 5)

19. Eye contact--Attentive, listening (Figure 5)

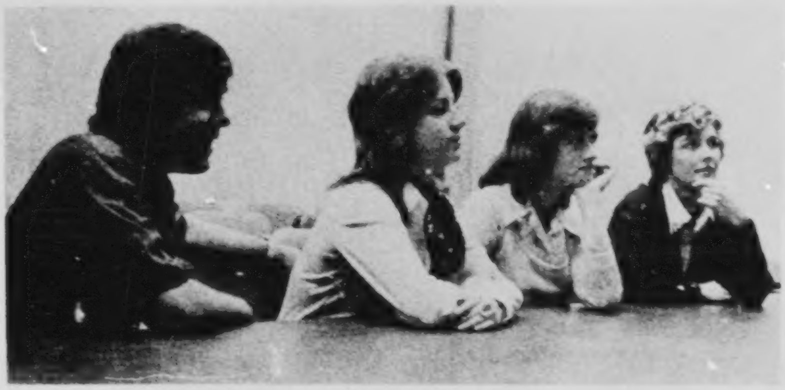
20. Hand stroking chin--Thoughtful consideration (Figure 5)

21. Hand on cheek--Thinking, interested, attentive (Figure 5)

22. Arm around another person's chair--Intimacy, closeness (Figure 5)

23. Shoulders upright--Energetic, determined (Figure 5)

FIGURE 5



INFORMATION SHEET

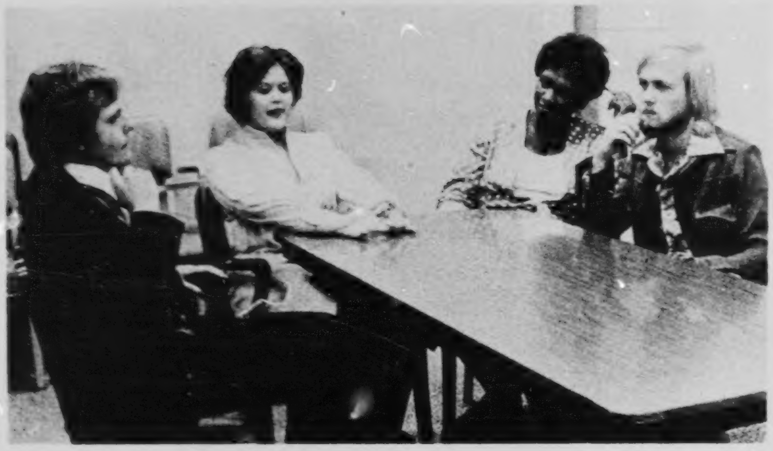
B. Negative gestures, expressions, and stances

(NOTE: The following are negative gestures, expressions, and stances. However, there may be situations when the following movements would not be considered negative.)

1. Nervous gestures--Lack of confidence, uneasiness (Figure 6)

Examples:	Tapping, cracking knuckles, wringing hands, tugging at hair and mustache, rapid blinking of eyelids, biting lips, scratching, licking lips, tugging at collar or tie, puckering lips, twisting mouth, swaying, smacking lips, clearing throat

FIGURE 6



2. Closed fist--Hostility, lack of acceptance (Figure 7)

3. Steepling with hands--Taking a firm stand with little chance of changing (Figure 7)

4. Hung head--Lack of organization (Figure 8)

5. Shrugged shoulders--Lack of ambition (Figure 8)

6. Shuffling feet--Lack of energy and ambition (Figure 8)

INFORMATION SHEET

7. Raising shoulders casually--Indifference (Figure 8)

FIGURE 7

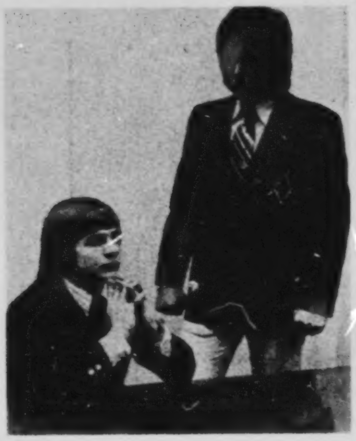
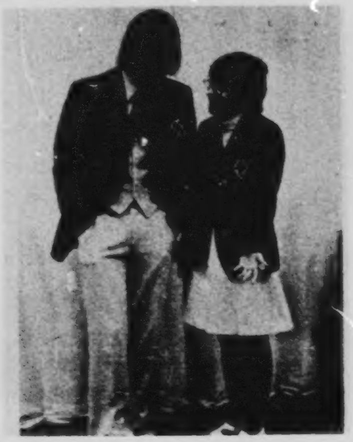


FIGURE 8



8. Hands clasped behind head while sitting--Authority but maybe a little insecure (Figure 9)

9. Moving around in chair--Restlessness (Figure 9)

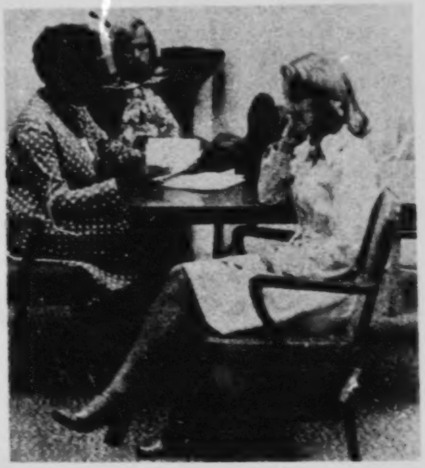
10. Shuffling papers--Anxious (Figure 9)

11. Moving foot in small circle or swinging crossed leg--Bored (Figure 9)

12. Separation by a desk, standing on a platform, sitting at the head of the table--Superiority (Figure 9)

13. Feet up on furniture--Ownership, possessiveness, unconcern or hostility to another person (Figure 9)

FIGURE 9



INFORMATION SHEET

14. Hands on sides of waist--Anger, disgust (Figure 10)

15. Scowl--Disapproval (Figure 10)

16. Lower lip protruding--Pouting, sulking (Figure 10)

17. Slight tilt of head to one side--Doubt (Figure 11)

18. Raised eyebrows--Surprise, doubt, indifference (Figure 11)

19. Arms folded tightly high on chest--Closed, defensive, disagreement, discomfort, withdrawing from conversation (Figure 11)

FIGURE 10

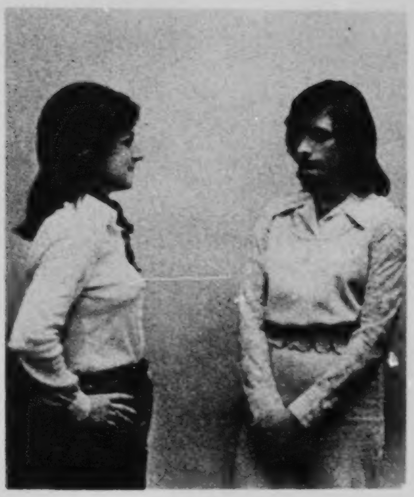
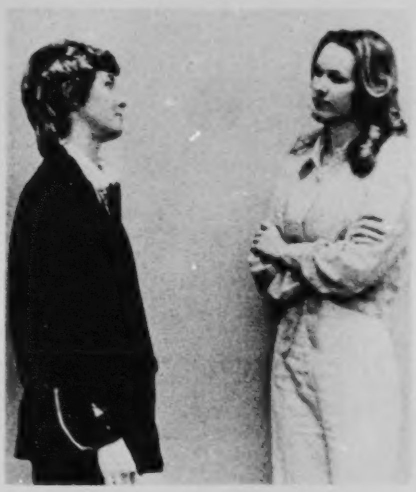


FIGURE 11



20. Side of head leaning on hand--Bored (Figure 12)

21. Steepling under chin--Critical evaluation, in some way negative toward the person attempting to persuade (Figure 12)

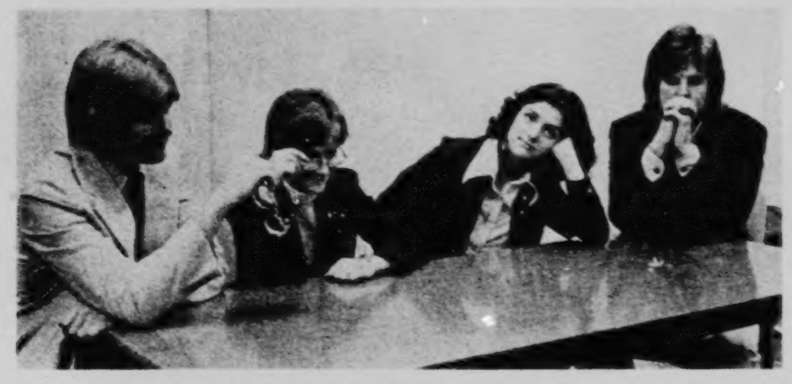
22. Gestures with glasses taken off--Wants time to think, needs more information (Figure 12)

23. Looking over top of glasses--Causes a negative emotional reaction in others when dropping eyeglasses onto the bridge of the nose and peering over them; makes the other person feel he/she is being stared at (Figure 12)

INFORMATION SHEET

24. Hand over eyes--Deep thought or concern (Figure 12)

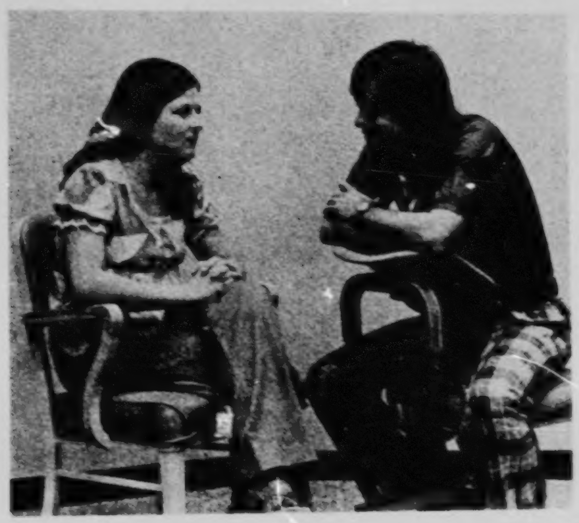
FIGURE 12



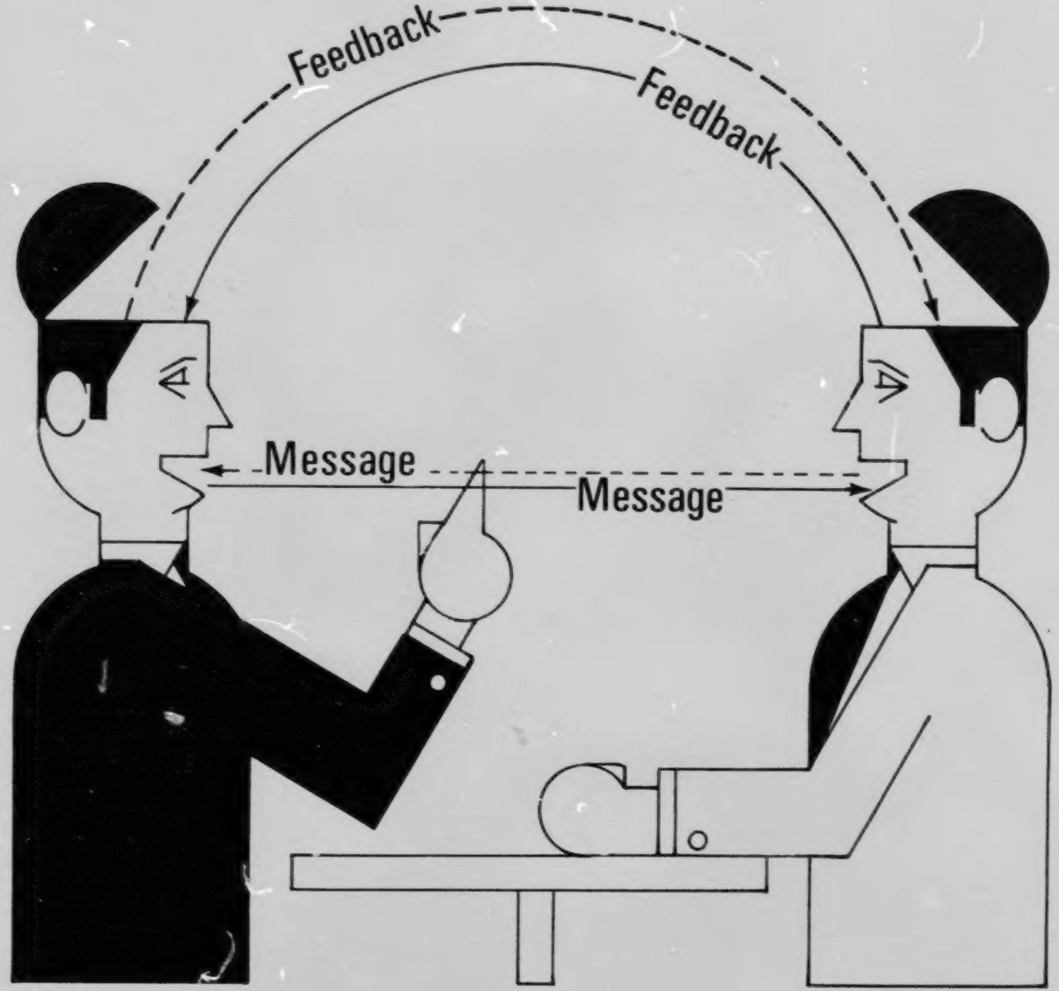
25. Sitting in chair backwards--Dominance, aggression (Figure 13)

26. Lips pressed tightly--Anger, determination (Figure 13)

FIGURE 13



Feedback

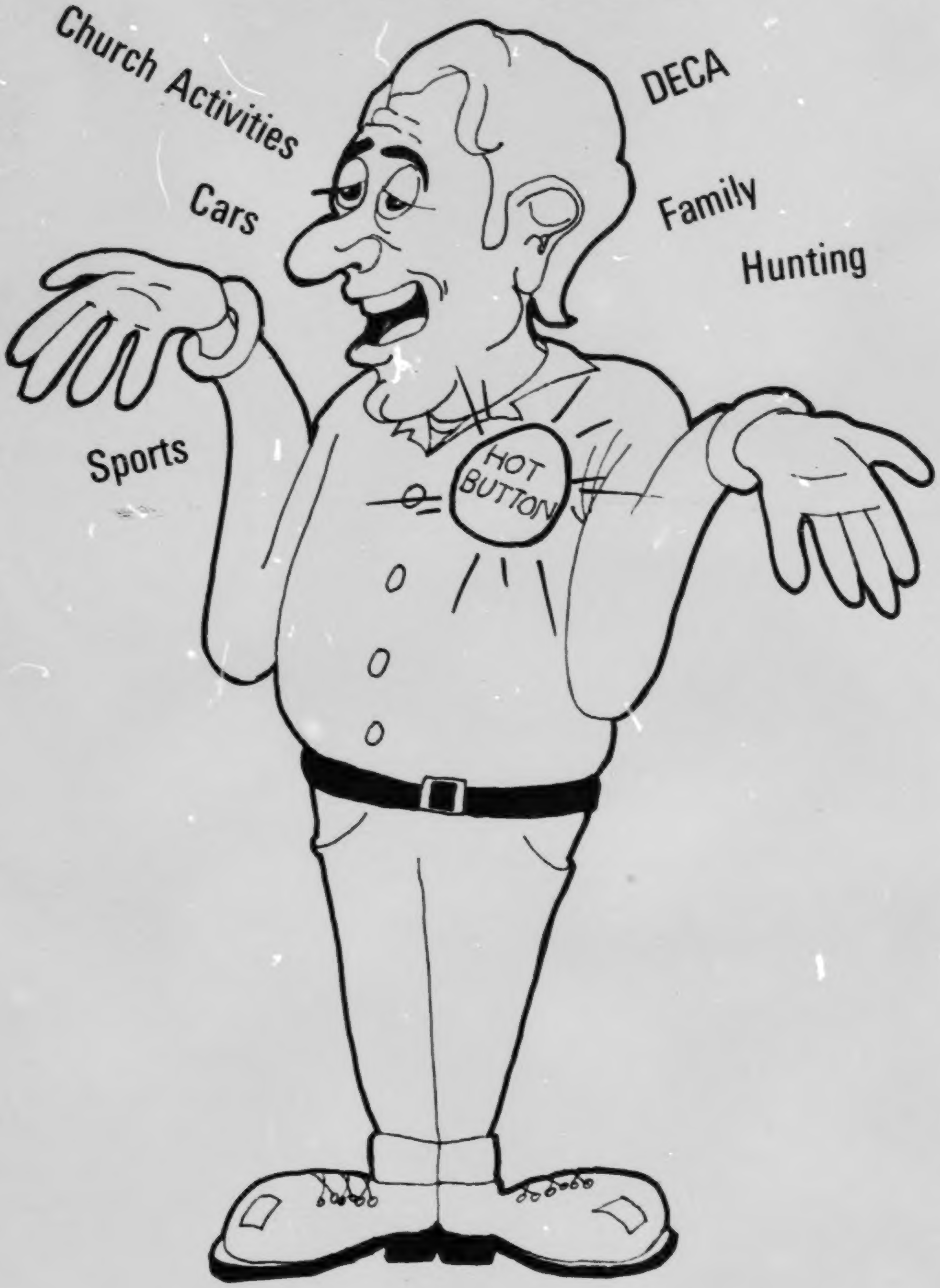

Feedback
Feedback
Message
Message

Empathy

Don't Criticize A Man Until You Have Walked A Day In His Mocassins.

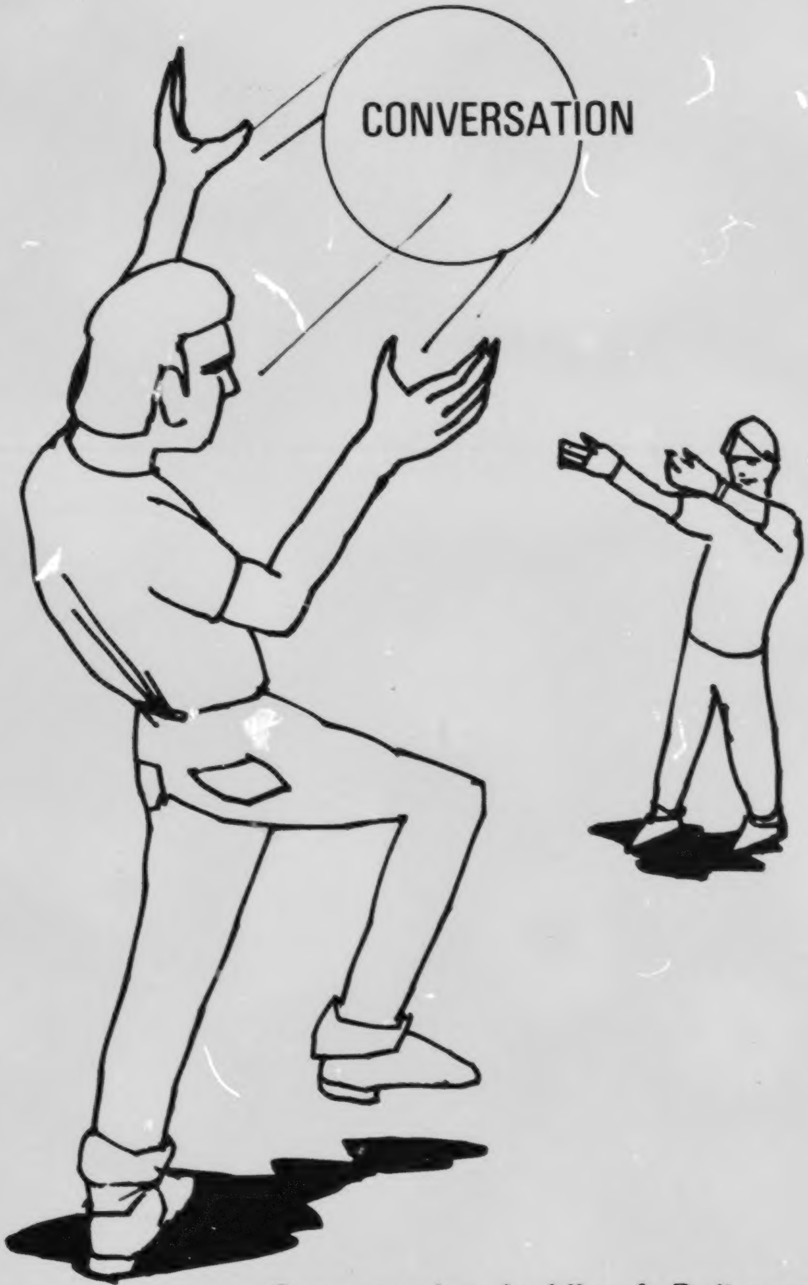
An Indian Proverb

Good Conversation


Church Activities
Cars
Sports
DECA
Family
Hunting
HOT BUTTON

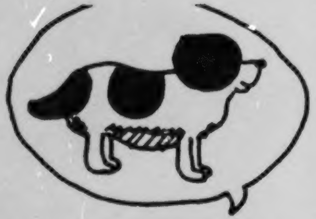
FIND A PERSON'S HOT
BUTTON FOR GOOD CONVERSATION

Two-Way Conversation

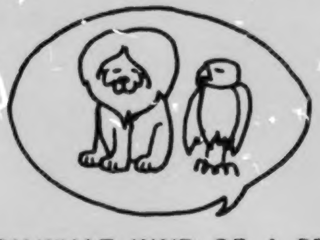

CONVERSATION

Conversation Is Like A Ball game - -
It Must Be Tossed Back And Forth

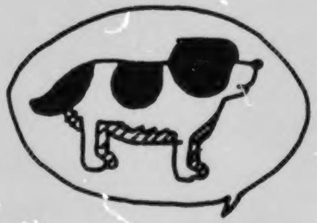
Communicating



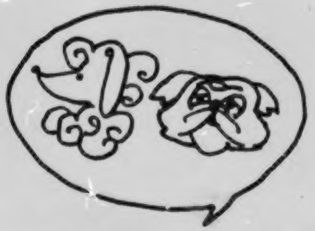
"I HAVE A PET AT HOME"



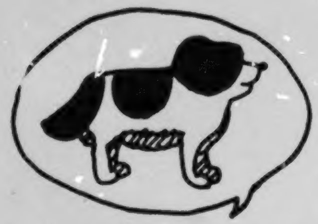
"OH,WHAT KIND OF A PET?"



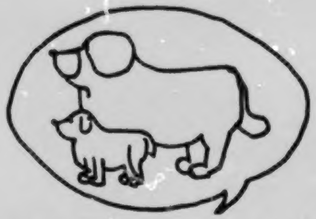
"IT IS A DOG"



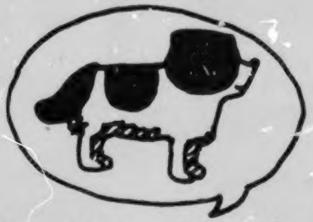
"WHAT KIND OF A DOG?"



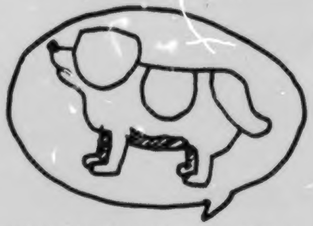
"IT IS A ST. BERNARD"



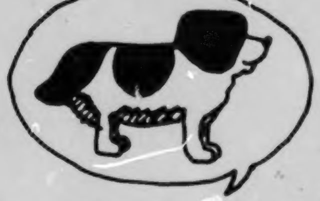
"GROWN UP OR A PUPPY?"



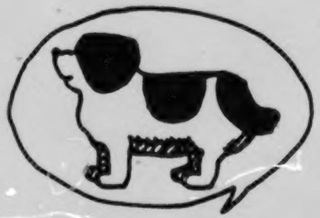
"IT IS FULL GROWN"



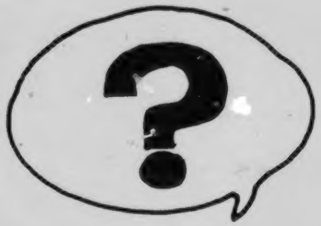
"WHAT COLOR IS IT?"



"IT IS BROWN AND WHITE"



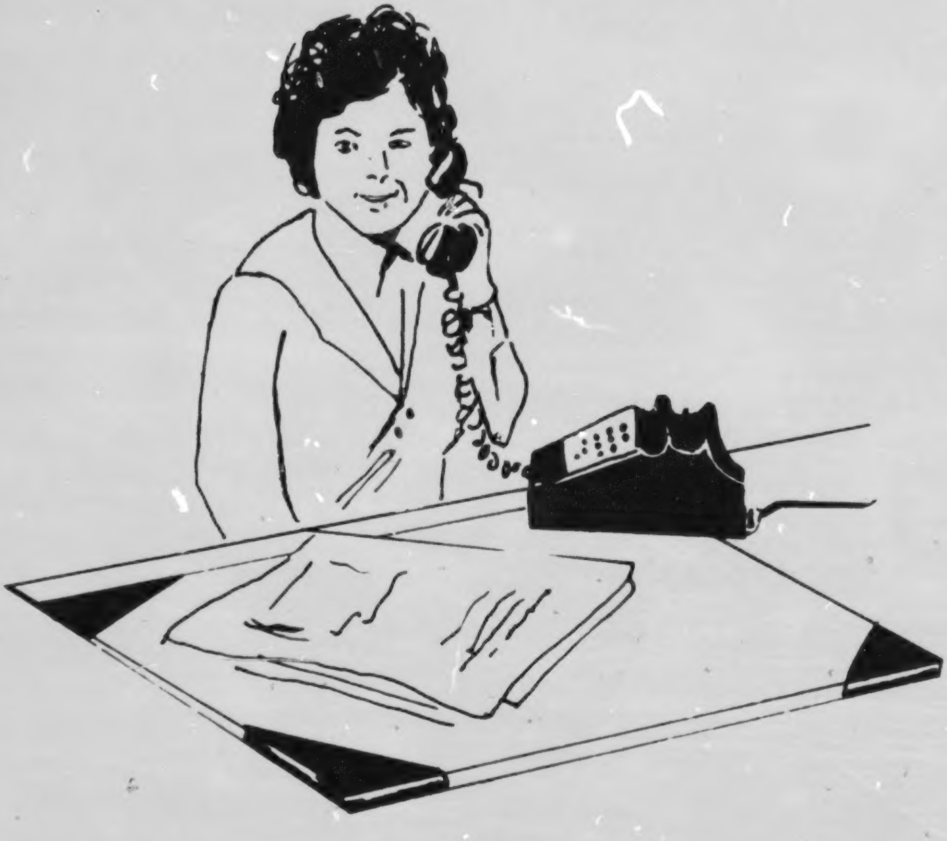
"WHY DIDN'T YOU SAY YOU
HAD A FULL GROWN BROWN
AND WHITE ST. BERNARD AS
A PET IN THE FIRST PLACE?"



"WHY DOESN'T ANYBODY UNDERSTAND ME ?"

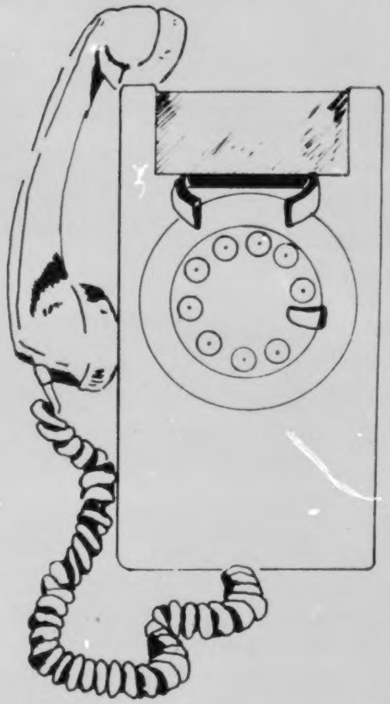
DO NOT ASSUME EVERYONE UNDERSTANDS COMMON WORDS

Placing A Call

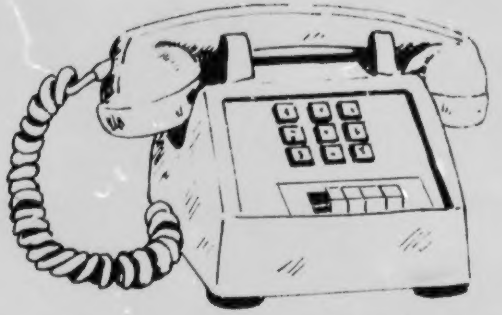


WHEN YOU PLACE A CALL, YOU ARE THE COMPANY

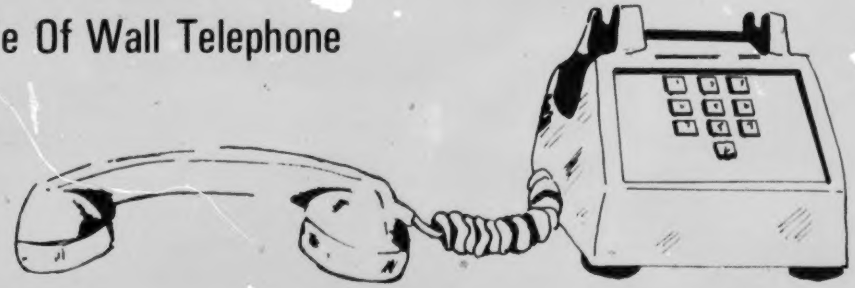
Leaving Telephone Unattended



Lay Receiver Against Side Of Wall Telephone



Press Hold Button



Lay Receiver Flat

COMMUNICATIONS
UNIT V

ASSIGNMENT SHEET #1--GIVING DIRECTIONS AND INSTRUCTIONS

Select a product or service you sell on your present job or which you might be associated with in the future. Give directions or instructions on how to use, assemble, store, or care for the product or how to obtain or perform the services. Organize your thoughts below and then give the instructions or directions to the class. Let your classmates rate and discuss the effectiveness of your directions or instructions using the following questions.

1. Were the directions or instructions clear?
2. Were they in an order that could be followed easily if you knew nothing about the product or service beforehand?
3. Were there any unnecessary points made?
4. What were the clues that the right directions or instructions were followed?

ORDER OF STEPS

COMMUNICATIONS
UNIT V

ASSIGNMENT SHEET #2--CLARIFYING STORE POLICIES

Answer in writing and/or role play the following situations.

1. Ms. Fussbudget is looking for birthday cards in a large discount store. She approaches another person in the hosiery department and asks where to find the birthday cards. The salesperson answers, "I really don't know, but I think it might be near the back of the store."

   Could the directions have been given more clearly? How? What kind of image or impression do you think the customer has of the store?

2. Store policy states that two forms of identification must be shown when cashing a check. A customer writes a check and says he only has one form of identification. What do you say?

3. You work in a shoe store. The rules state that a foot covering is required when trying on shoes. A woman is trying on shoes with her bare feet. She approaches you and asks for a different color shoe. What do you say?

4. The law says that undergarments may not be returned or exchanged. A customer who has traded in your store for many years wants to return a girdle which she can't get in to. What do you say?

ASSIGNMENT SHEET #2

5. Refunds may not be given on sale items in your store. An irate customer demands that her money be returned on an item purchased at the sale price or she will talk to the manager and get you fired. What do you say?

6. Refunds and exchanges in your store cannot be made without the sales receipt. A customer who appears very uneasy is trying to make an exchange but does not have the sales receipt. He does not say anything but there is a sign clearly displayed stating the store's policy. What will you say?

7. The sign says, "No shoes, no shirt, no service." Three young men without shoes and shirts come into the restaurant where you work and sit in your section. What will you say?

8. No pets are allowed in the store. A very dignified looking lady enters with a poodle on a leash. What will you say?

9. A high school friend is seen taking two items into the dressing room, but the store policy says that only one item may be taken into the dressing room at a time. What will you say to your friend?

10. A small child is eating an ice cream cone in the store. This is against store policy. What will you say?

COMMUNICATIONS
UNIT V

ASSIGNMENT SHEET #3--PRONOUNCING WORDS DISTINCTLY

1. Translate into writing the following words and phrases.
    a. Wuryagoin?
    b. Whutimizut?
    c. Dya wanna go widdem or widus?
    d. Cher turn tucall, Margrut.
    e. Wy dincha stoppim?
    f. Watchagonnado nex Winsdy?
    g. Ohuhdunno--probly jussidat home asuzhel.
    h. Wenzee cumin?
    i. Uh tole um uh din wanany.
    j. Whidencha gidda ticket forda boxun mach?
    k. Doncha ever unnerstan whucha read?
    l. Uh dunno wy ya din gimme some.
2. Read the following tongue twisters aloud. Be careful not to omit any necessary vowel or consonant sounds.
    a. Strict strong Stephen Stringer snared slickly six silly snakes.
    b. Strange strategic statistics.
    c. Shy Sarah saw Swiss wrist watches.
    d. The sixth sheik's sixth sheep's dead.
    e. Tie the twine to three tree twigs.
    f. With which winsome witch were you whispering?
    g. Well, when Will whiffed the wild wintry wind, he whisked out his wicked whiskey.

ASSIGNMENT SHEET #3

h. At her willful whim, the whip whizzed over the wheelbarrow where Willy was whimpering.

i. Six long slim slick slender slacks slid silently to the floor.

j. Furthermore, Francis Farkwark fried fifteen fish for Francis Fambush's father.

k. She stood on the balcony, mimicking him hiccupping and welcoming him inside.

l. A snifter of snuff is not enough snuff for the snuff snifter to sniff.

m. Slippery sleds slide swiftly down slick streets.

n. Thomas Tattertoot took tough twine to tie ten twigs to two tall tree trunks.

o. What whim led Whitney White to whittle, whisper, and whimper near the wharf where a whale might wheel and whirl?

p. I never felt felt feel like that fine felt felt.

3. Translate into writing the following words.

a. Dese

b. Dose

c. Wen

d. Budder

e. Thoid

f. Ti-ip

g. Warsh

h. Ca-ounty

i. Git

4. Read the following words aloud. Be careful not to omit any necessary vowel or consonant sounds.

a. Bringing

b. Picture

ASSIGNMENT SHEET #3

c. Candidate

d. Laboratory

e. Midst

f. Fifths

g. Width

h. Pitcher

i. Prairie

j. Route

k. Window

l. Creek

5. Rewrite the following sentences using correct English.

   a. Bill said, "I wanna sell three washing machines today."

   b. John said, "We'll hafta check to see if we have that brand or not."

   c. The salesperson said, "I'm gonna check to see if we can have that delivered or not."

   d. "She coulda done that yesterday."

   e. "Commere. I need your help," said the department head.

   f. "Will you gimme a hand?"

   g. "Doncha want dessert?" asked the waitress.

   h. "I dunno if we have any pullover sweaters."

   i. "Hooja say you want to see?"

   j. "Woncha come back again?"

COMMUNICATIONS
UNIT V

ASSIGNMENT SHEET #4--USING PROPER ENGLISH

1. Circle the correct word.

   a. If the president (was, were) here, the meeting could start.

   b. The students have (hanged, hung) the merchandise in the display from the ceiling.

   c. I would go to the conference if I (was, were) Barbara.

   d. I have (saw, seen) the security person catch a shoplifter many times.

   e. Everyone (is, are) ready to go.

   f. I am positive it was (they, them) who did it.

   g. (She, Her) arranged that lovely window display.

   h. Barbara, Jan, and (he, him) will be working tomorrow.

   i. You and (I, me) can sell all of these items quickly.

   j. She is as good a salesperson as (us, we).

2. Write the following sentences correctly.

   a. The child were astonished as they watched the salesperson demonstrate the yo-yo.

   b. The nice lady in the show were professional models.

   c. She don't got any.

   d. Will you please help Jim and I?

   e. We ain't got any.

   f. These coats are better than them coats.

   g. I seen them take the items.

   h. She done that Saturday.

   i. See them tickets over there?

   j. I rung the cash register wrong.

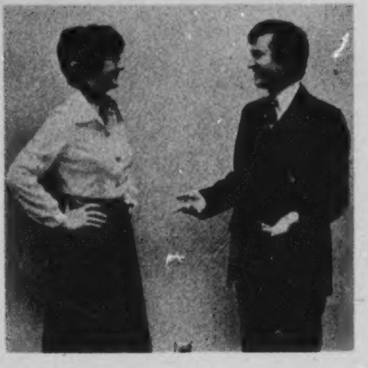
   k. I begun to make the tickets for the merchandise.

   l. The fashion show done real good.

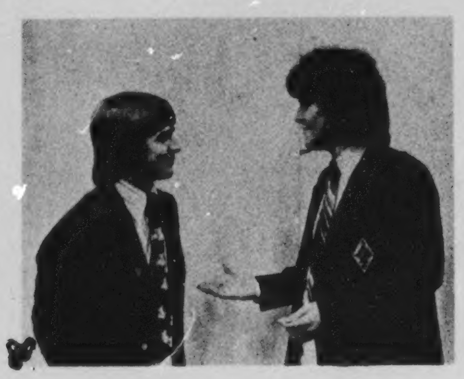
COMMUNICATIONS
UNIT V

ASSIGNMENT SHEET #5--INTERPRETING BODY LANGUAGE

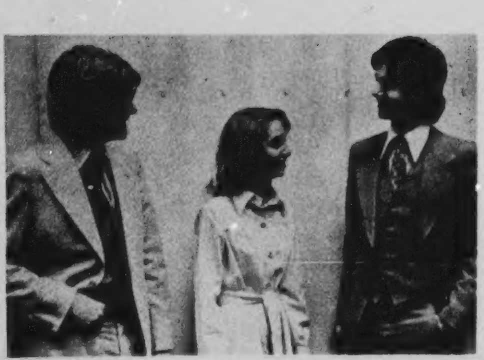
1. Observe the pictures on the following pages. List the body language signals and explain what each person is communicating through those signals. Write your answers in the space below each picture. Look back to the information sheet if you need help.



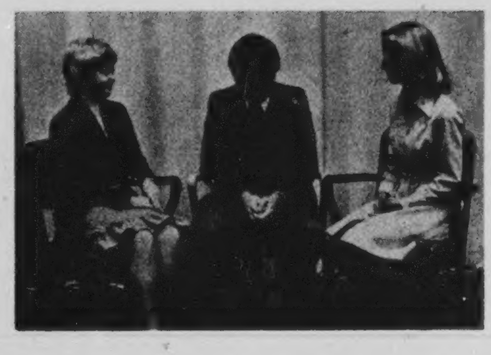
a.



b.



c.



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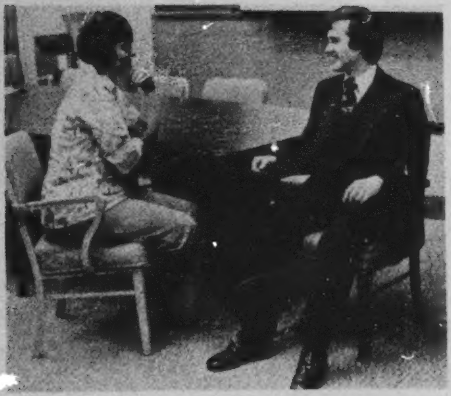
ASSIGNMENT SHEET #5



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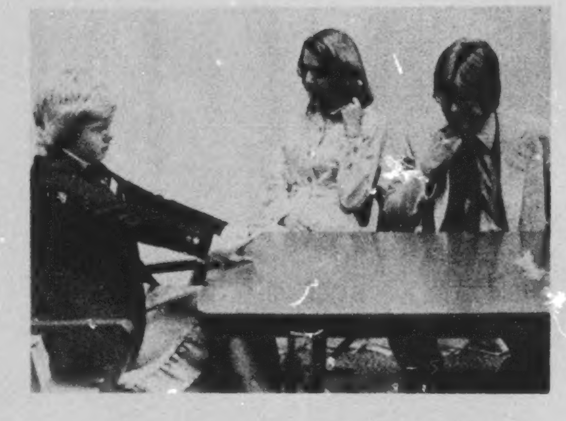

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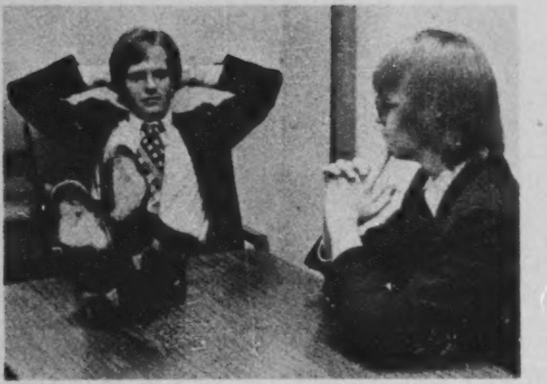

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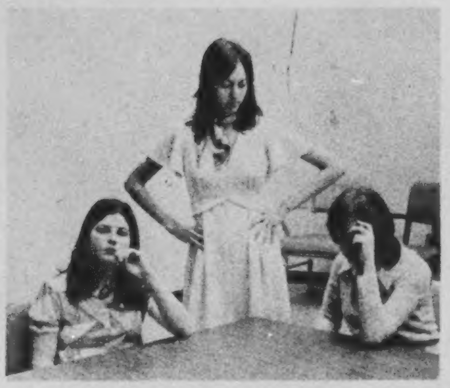

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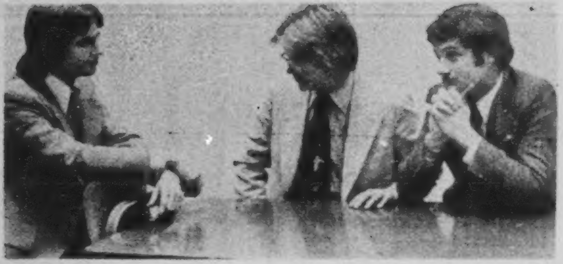


i.

ASSIGNMENT SHEET #5

2. Is it possible that a person can improve his/her attitude and communication skills by being aware of his/her body language?

3. Can you make it a challenge to win others over to a positive attitude by communicating a positive attitude through words and actions even when others are communicating a negative attitude?

4. Can you think of other situations where body language speaks loudly, such as at home, with friends, on dates, in politics, or in church?

COMMUNICATIONS
UNIT V

ASSIGNMENT SHEET #6--ANALYZING VOICE QUALITIES

Do a tape recording of your voice. Then, listen to the tape and complete the rating which follows. Using the rating of your voice on tape, prepare a list of ways in which you can improve your voice. Complete the list on a separate piece of paper.

Have your classmates rate your voice, too. Check back periodically to see if there has been any noticeable progress.

VOICE RATING

When the answer to any of the following questions is "yes," put down a minus four. If it is "maybe" or "sometimes," put down a minus two. If it is "no," put down zero. Of course, the lower the numerical score the fewer voice faults you have. A score of 0 to -10 is excellent; -10 to -20 is good; -20 to -30 is fair; and -30 and below is unsatisfactory.

		Answer			Score
		Yes	Maybe/Sometimes	No	
1.	Do you speak too loudly or in a noisy manner?				
2.	Do people frequently ask you to repeat a statement you have made?				
3.	Do you speak in the same tone continually?				
4.	Do you speak with the same volume continually?				
5.	Do you speak in an artificial, unnatural, and affected voice?				
6.	Is your voice high pitched and shrill?				
7.	Do you frequently speak with lungs almost empty?				
8.	Do you speak in long sentences which frequently lose their meaning?				

ASSIGNMENT SHEET #6

		Answer			Score
		Yes	Maybe/Sometimes	No	
9.	Do you hiss when using certain letters? (P, B, T, C, S)				
10.	Do you speak in mush tones as though you had something in your mouth?				
11.	Do you use "uh" and "er-uh" frequently?				
12.	Is your voice clouded and husky?				
13.	Do you talk "through your nose"?				
14.	Do you talk in a jerky manner?				
15.	Do you talk in a whining and apologetic manner?				
16.	Do you talk in a dominating, dictatorial tone?				
17.	Do you stammer and stutter?				
18.	Do you often speak too fast or in a slow drawl?				
19.	Do you mispronounce words frequently?				
20.	Does your voice lose its force and expression at the end of sentences?				
21.	Do you speak in a flat, dull and colorless tone?				
22.	Do you jumble up consonants, which make your speech hard to understand?				

ASSIGNMENT SHEET #6

		Answer		Score
		Yes	Maybe/Sometimes	No
23.	Do you use a "gushy" or "gooey" voice when talking to friends?			
24.	Do you choke off vowel sounds?			
25.	Is your voice unpleasant when you laugh?			
26.	Do you put the "d," "t," and "ing" on the end of words?			
27.	Do you run words together?			
28.	Do you have a whining voice?			
29.	Do you use colloquialisms or speak with an accent?			
30.	Do you have an adequate vocabulary?			
31.	Do your words flow out evenly and clearly?			
32.	Is your voice friendly and cordial?			
33.	Can you be heard clearly in the back of the room when speaking?			
34.	Do you emphasize your main thought?			

COMMUNICATIONS
UNIT V

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1--Evaluated to the satisfaction of the teacher-coordinator

Assignment Sheet #2--Evaluated to the satisfaction of the teacher-coordinator

Assignment Sheet #3

1. a. Where are you going?
   b. What time is it?
   c. Do you want to go with them or with us?
   d. It is your turn to call, Margaret.
   e. Why didn't you stop him?
   f. What are you going to do next Wednesday?
   g. Oh, I don't know--probably just sit at home as usual.
   h. When is he coming?
   i. I told them I did not want any.
   j. Why didn't you get a ticket for the boxing match?
   k. Don't you ever understand what you read?
   l. I don't know why you didn't give me some.

3. a. These
   b. Those
   c. When
   d. Butter
   e. Third
   f. Tip
   g. Wash
   h. County
   i. Get

Assignment Sheet #3 (continued)

5. (NOTE: The following answers are corrected parts of each sentence.)

a. I want to

b. We will have to

c. I'm going to check

d. She could have

e. Come here

f. Give me

g. Don't you want

h. I don't know

i. Who did you say

j. Won't you

Assignment Sheet #4

1. a. Were

b. Hung

c. Were

d. Seen

e. Is

f. They

g. She

h. He

i. I

j. We

2. a. 1) The child was astonished . . . .

2) The children were astonished . . . .

b. 1) The nice lady in the show was a professional model.

2) The nice ladies in the show were professional models.

Assignment Sheet #4 (continued)

c. She doesn't have any.

d. Will you please help me?

e. We don't have any.

f. These coats are better than those coats.

g. I saw them take the items.

h. She did that Saturday.

i. See those tickets over there?

j. I rang the cash register wrong.

k. I began to make the tickets for the merchandise.

l. The fashion show did well.

Assignment Sheet #5

		Signals	Communication
1.	a.	Open palms	Open, friendly
		Hands on hips	Aggressive
		Eye contact	Attentive, listening
		Smiling	Pleasant
		Shoulders upright	Energetic, determined
	b.	Open palms	Open, friendly
		Coat unbuttoned	Open, friendly
		Smiling	Pleasant
		Eye contact	Attentive, listening
		Hands clasped behind back	Thinking, listening, contemplating
		Head held high	Complete control
		Shoulders upright	Energetic, determined
	c.	Fingers tucked under belt	Confident, cool
		Hand in one pocket	Calm
		Eye contact	Attentive, listening
		Smiling	Pleasant
		Arms straight at sides	Collected, poised
		Shoulders upright	Energetic, determined
	d.	Knees together	Modest
		Legs crossed at the ankles	Graceful
		Head hung	Lack of organization
		Legs back under chair	Poised, graceful silhouette
		Shoulders shrugged	Lack of ambition

	Signals	Communication
e.	Sitting with feet flat on floor	Poised
	Sitting slightly forward in chair	Attentive
	Smiling	Pleasant
	Eye contact	Attentive, listening
	Shoulders upright	Energetic, determined
	Hand stroking chin	Thoughtful consideration
	Separation by desk	Superiority
f.	Cracking knuckles	Nervous gesture
	Tugging at hair	Nervous gesture
	Biting lips	Nervous gesture
	Tugging at collar	Nervous gesture
	Twisting mouth	Nervous gesture
g.	Steepling with hands	Taking a firm stand with little chance of changing
	Hands clasped behind head while sitting	Authority but maybe a little insecure
	Feet up on furniture	Ownership, unconcern or hostility to another person
h.	Gestures with glasses taken off	Wants time to think, needs more information
	Hand over eyes	Deep thought or concern
	Scowl	Disapproval
	Hands on sides of waist	Anger, disgust
i.	Sitting backward in chair	Dominance, aggression
	Looking over top of glasses	Causes a negative emotional reaction; makes the other person feel he/she is being stared at
	Steepling under chin	Critical evaluation, in some way negative toward the person attempting to persuade
	Raised eyebrows	Surprised, doubtful, indifferent

COMMUNICATIONS
UNIT V

TEST

1. Match the terms on the right to the correct definitions on the left by placing the appropriate numbers in the blanks provided.

______a. Putting self in other person's position; participating in another person's feelings or ideas

______b. All the ways by which meaning is conveyed from one person to another

______c. Returning to the beginning source; finding out how one did

______d. Informal communication system that exists in all organizations; may be helpful or harmful depending on how it is used

______e. Written announcement sent to members of an organization

______f. Place where written notices and reminders may be seen easily

______g. Magazine produced by a company to build morale among the employees

______h. Publications printed by various nonprofit organizations to disseminate information about the industry

1. Communication
2. Empathy
3. Feedback
4. Trade association journals
5. House magazine
6. Bulletin board
7. Memo
8. Grapevine

2. Select from the list below those factors necessary for effective communication by placing an "X" in the correct blanks.

______a. Impressing the listener

______b. Feedback

______c. Trust in the person sending the message

______d. Use of big words

______e. Saying only "yes" and "no" unless necessary to say more _____f. Listening

_____g. Interrupting

_____h. Proper timing

_____i. Empathy

3. Select from the following list the ways to achieve effective communication. Place an "X" in the correct blanks.

_____a. Talk loudly

_____b. Use a regional accent

_____c. Encourage questions and participation

_____d. Use examples to illustrate main ideas

_____e. Use big words

_____f. Use the kind of language the listener will understand

_____g. Respect the listener

_____h. Impress the listener with your knowledge of the subject matter

_____i. Talk for a long time

_____j. Get to the point; do not talk too much

_____k. Pay attention

_____l. Make allowances for those who may have something worthwhile to say but who lack the ability or experience to express themselves well

_____m. State clearly why orders are given or why certain standards or results are expected

4. Discuss the proper way to introduce yourself.

5. Discuss the proper way to introduce others.

6. Discuss the proper way to acknowledge introductions.

7. Select from the following list ways to carry on casual conversation. Place an "X" in the correct blanks.

______a. Ask questions to discover other person's interests

______b. Talk about yourself a lot

______c. Avoid controversial subjects such as religion and politics

______d. Talk about your latest achievement

______e. Do not monopolize the conversation

______f. Be a good listener and people will think you are a great conversationalist

______g. Discuss controversial subjects

______h. Call all people by their first name

______i. Say friendly phrases, such as "Good Morning," automatically

______j. Follow single word answers like "yes" and "no" with the person's name and a simple statement to make the reply sound friendly and not curt

8. Select from the following list those things which should be done to give directions and instructions clearly. Place an "X" in the correct blanks.

______a. Concentrate on all the steps to be followed before speaking

______b. Present the steps clearly and in proper order _____c. Avoid details that do not add to the main point

_____d. Give clues so the person knows when he/she is following the right directions or instructions

9. Discuss the factors necessary for clarifying store policies.

10. Discuss the factors necessary for communicating product information.

11. Select from the following list rules for using the telephone correctly. Place an "X" in the correct blanks.

_____a. Answer promptly

_____b. Identify yourself

_____c. Say "speaking" after giving your name

_____d. Use the customer's name often

_____e. Speak distinctly into the receiver

_____f. Ask who is calling

_____g. Ask "Will you hold or shall I call you back?" when you must leave the line to get information

_____h. Check back frequently to assure the customer he/she has not been forgotten if it becomes necessary to leave the telephone for long periods of time

_____i. Attract attention before resuming the call

_____j. Apologize for errors or delays

_____k. Press the hold button to cut out noisy distractions

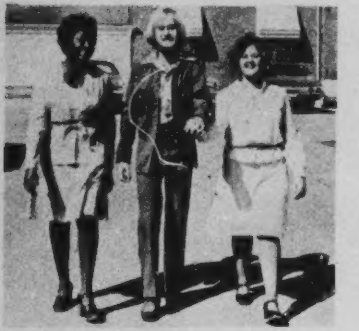
_____l. Visualize the person on the other end of the line

_____m. Smile while you talk

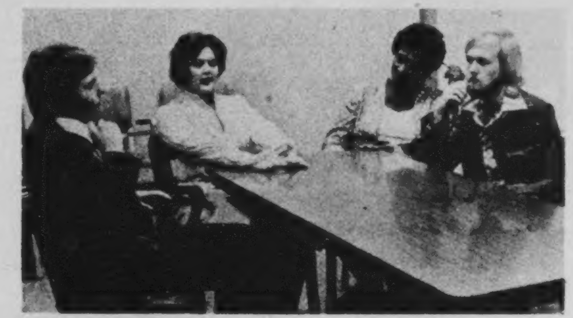
_____n. Replace the telephone receiver easily _____o. Write down the points to be covered and questions to be asked before placing a call

_____p. State "This is long distance" when calling long distance directly

12. Distinguish between positive and negative gestures, expressions, and stances. Write "positive" under those scenes which communicate a positive attitude and "negative" under those which do not.



a. ____________________



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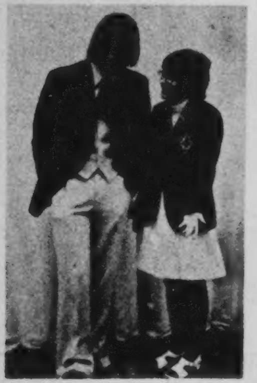
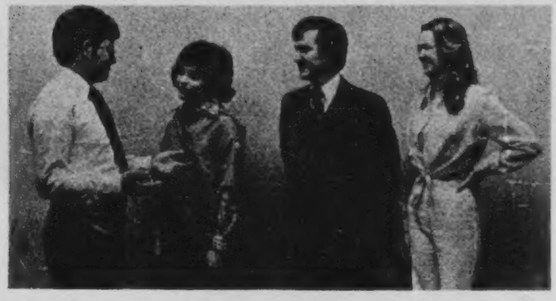


c. ____________________



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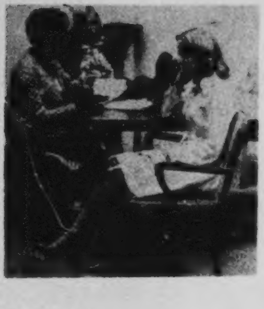
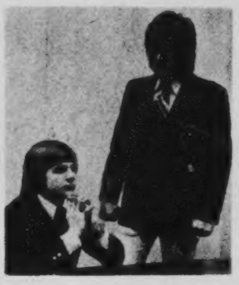


e. ____________________



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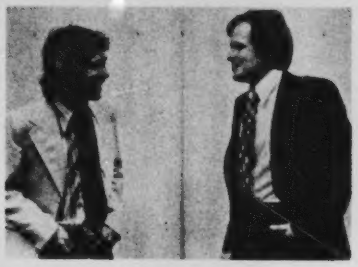

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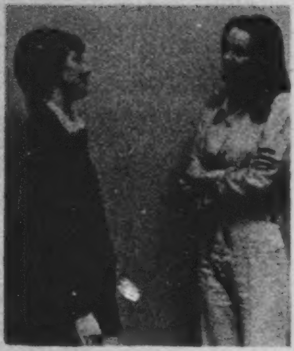
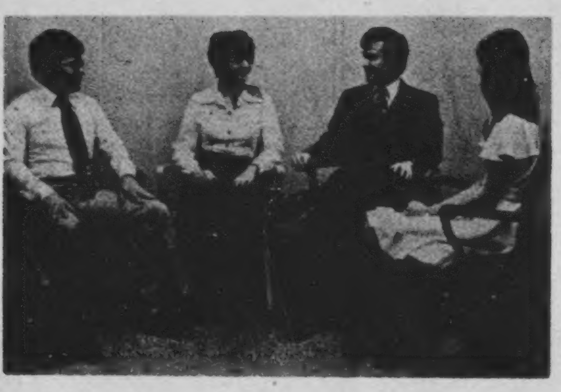
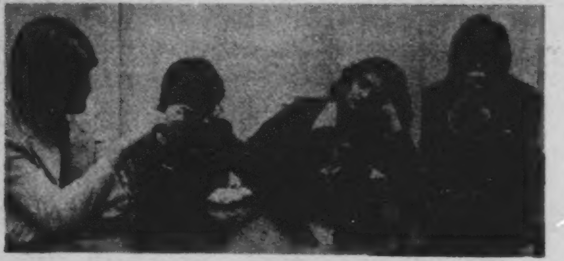


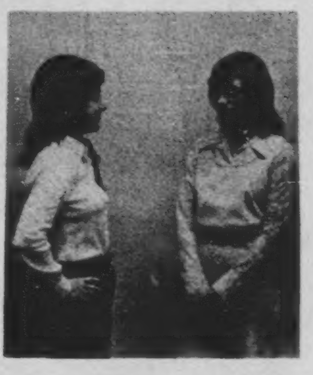
h.______________________



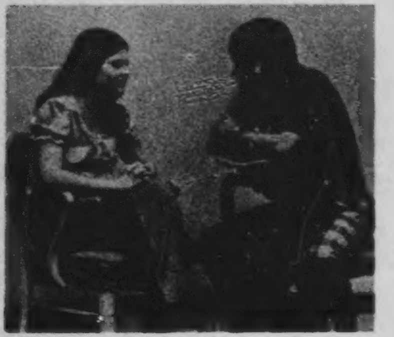
i.______________________



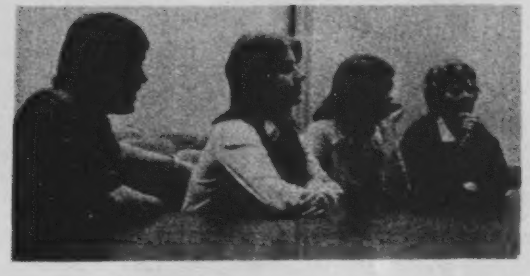
j.______________________



k.______________________



l.______________________



m.______________________

13. Analyze voice qualities.

(NOTE: If the above activity has not been accomplished prior to the test, ask your instructor when it should be completed.)

COMMUNICATIONS
UNIT V

ANSWERS TO TEST

1. a. 2 d. 8 g. 5

   b. 1 e. 7 h. 4

   c. 3 f. 6

2. b, c, f, h, i

3. c, d, f, g, j, k, l, m

4. Discussion should include:

   a. Introduce yourself promptly

   b. Give first and last names

   c. State names slowly and distinctly

   d. Complete introduction by giving some information about yourself so new acquaintances may talk easily with you and remember you

   e. Repeat names during the introduction and conversation so they may be remembered correctly

5. Discussion should include:

   a. Introduce men to women

   b. Introduce younger people to older people

   c. Introduce subordinates to superiors

   d. Introduce all others in any order

   e. Give some additional information about the persons introduced to get a conversation started

   f. Do not say, "This is my friend," for it suggests that the other person is not a friend

   g. Repeat names slowly and distinctly during the introduction and conversation so they may be remembered correctly

6. Discussion should include:

   a. "How do you do" followed by an informal comment is always appropriate in business situations

   b. Men shake hands with each other

   c. Women may shake hands with each other

   d. Men should not shake hands with women unless the women make the first move

   e. Handshakes should be firm but not crushing

7. a, c, e, f, i, j

8. a, b, c, d

9. Discussion should include:

   a. Be polite

   b. State the policy clearly

   c. Give the reasons for the policy when appropriate

   d. Offer an alternative solution

10. Discussion should include:

    a. Avoid meaningless, trite phrases

    b. Avoid slang

    c. Pronounce words distinctly

    d. Be sure terms are interpreted the same way by both the salesperson and the customer

    e. Use proper English

11. a, b, d, e, g, h, i, j, k, l, m, n, o, p

12. a. Positive

    b. Negative

    c. Negative

    d. Positive

    e. Negative

f. Negative

g. Positive

h. Negative

i. Positive

j. Negative

k. Negative

l. Negative

m. Positive

13. Evaluated to the satisfaction of the teacher-coordinator

HUMAN RELATIONS
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to analyze and improve upon his/her personality and relationships with other persons. The student should be able to list and/or select factors dealing with physical and emotional characteristics of personality, self-respect, respect for others, motivation, using time wisely, goal setting, changing attitudes, and solving problems. This knowledge will be evidenced by a score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with human relations to the correct definitions.
2. Select from a list reasons for human relations training.
3. Select from a list true statements about physical and emotional characteristics of personality.
4. List the three sides of self.
5. State the values of having self-respect.
6. List the reasons some people have little self-respect.
7. Select from a list characteristics of people with little self-respect.
8. Name the ways to protect self-respect.
9. List the ways to achieve self-control.
10. Select from a list ways to show respect for others.
11. Select from a list desirable characteristics of employees.
12. Match descriptions of unpleasant co-workers to ways to handle the human relations problems.
13. List ways to overcome boredom on the job.
14. Arrange in order the steps to using time wisely.

15. List the things that motivate people.

16. Arrange in order the levels of human needs from the lowest level to the highest level.

17. Select from a list the benefits of setting goals.

18. List the steps for creating a change in attitude.

19. Arrange in order the steps to solve problems.

HUMAN RELATIONS
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

   A. Give pretest using objective sheet.

   B. Order films.

   C. Make transparencies.

   D. Provide student with objective sheet.

   E. Provide student with information and assignment sheets.

   F. Reproduce "Self-Improvement Contracts" in Assignment Sheet #6 periodically.

   G. Invite guest speakers, such as hair stylist, beautician, cosmetic representative, physical education teacher, home economics teacher, YMCA or YWCA director, health spa manager, or nutritionist.

   H. Make collage of clothing that does and does not go well together from pictures in catalogs and magazines.

   I. Use the *I Am Loveable and Capable* presentation by Sidney Simon.

   (NOTE: This booklet is available for $ .50 from Argus Communications; 7440 Natchez Avenue; Niles, Illinois 60648.)

   J. Discuss unit and specific objectives.

   K. Discuss information and assignment sheets.

   L. Give test.

   M. Reteach if necessary.

   N. Test again until minimum standard is reached.

II. Student:

   A. Read objective sheet.

   B. Study information sheet.

   C. Take notes.

   D. Complete assignment sheets.

   E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1--Three Sides of Self

    2. TM 2--Maslow's Hierarchy of Basic Needs

    3. TM 3--Goals Keep Us on the Right Track

  D. Assignment sheets

    1. Assignment Sheet #1--Grooming Analysis

    2. Assignment Sheet #2--Do You See Yourself As Others See You?

    3. Assignment Sheet #3--How You Get Along with Others

    4. Assignment Sheet #4--Managing Your Time

    5. Assignment Sheet #5--Self-Analysis

    6. Assignment Sheet #6--Self-Improvement

  E. Test

  F. Answers to test

II. References:

  A. Mattingly, John, and Kitzmiller, Charles. *Values for Distributive Education.* Columbus: Ohio State University, Distributive Education Materials Laboratory, 1974.

  B. Nach, R. A. *Work-in-Text for Earl Nightingale's Lead the Field.* Chicago: Nightingale-Conant Corporation, The Human Resources Company, 1974.

  C. *Human Relations.* rev. Columbus: Ohio State University, Distributive Education Materials Laboratory.

  D. Hiserodt, Donald D. *Psychology and Human Relations in Marketing.* Dallas: Gregg Division/McGraw-Hill Book Co., 1969.

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F. Lacy, Richard C., and Park, Ok D. *Job Application and Interview.* Columbia: University of Missouri, Instructional Materials Laboratory.

G. Chapman, Elwood N. *Your Attitude Is Showing.* Chicago: Science Research Associates, Inc., 1964.

H. Luter, Robert R. *Personal Development for Young Men.* Austin: University of Texas, Instructional Materials Laboratory, Distributive Education Department, 1967.

I. Burbrink, Pauline W. *Personal Development for Girls.* Austin: University of Texas, Instructional Materials Laboratory, Distributive Education Department, 1972.

J. Wilkens, Emily. *A New You: The Art of Good Grooming.* New York: G. P. Putman's Sons, 1965.

K. Whitcomb, Helen, and Cochran, Laura A. *Charm for Miss Teen.* Dallas: Gregg Division/McGraw-Hill Book Co., 1969.

L. Tolman, Ruth. *Charm and Poise for Getting Ahead.* New York: Milady Publishing Corp., 1967.

M. Famularo, Joseph J., and Atkinson, Phillip S. *Executive Profile: A Young Man's Guide to Business Success.* Dallas: Gregg Division/McGraw-Hill Book Co., 1967.

III. Films:

(NOTE: Oklahoma teachers may order films from the Oklahoma Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth Avenue, Stillwater, Oklahoma 74074. Out of state teachers may purchase films from the addresses listed below.)

A. "Pack Your Own Chute." Available from Ramic Productions; 60 West 57th Street; New York, New York 10019.

B. "A Day in the Life of Bonnie Consolo." Available from Arthur Barr Productions, Inc.; 3490 East Foothill Boulevard; Box 5667; Pasadena, California 91107.

C. "Is It Always Right to be Right?" Available from Roundtable Films, Inc.; Department CA 50; 113 North San Vincente Boulevard; Beverly Hills, California 90211.

HUMAN RELATIONS
UNIT I

INFORMATION SHEET

I. Terms and definitions

   A. Human relations--Getting along with other people

   B. Personality--All the physical, mental, and emotional characteristics that make up a whole person

   C. Respect--Recognizing the worth of self and the worth of other people, their property, and opinions

   D. Success--Making progress toward achieving a worthy goal

   E. Attitude--Feeling or emotion

II. Reasons for human relations training

   A. There are more service occupations today

   B. There are larger businesses today which require more group-oriented activities

   C. Research proves that good human relations increase productivity

   D. Business must treat all types of customers equally

   (NOTE: Management, therefore, must require employees to show a positive attitude to customers and co-workers.)

   E. More formality is generally required in business because an authority structure exists

   Examples: You might say to a friend, "Hi! Hey, your hair looks great."

   You might say to a supervisor, "Good afternoon, Miss Jones. Your new hair style is very nice."

   F. Sixty to seventy percent of the management duties are human relations skills

   G. Ninety percent of all jobs lost are lost due to the inability to get along with people

   H. Reaching one's goals often depends upon the ability to get along with others

INFORMATION SHEET

III. Physical and emotional characteristics of personality

   A. Physical characteristics (Assignment Sheet #1)

      1. Affect self-confidence

      2. Determine first impressions to a great extent

         (NOTE: First impressions may be right or wrong but they are important because they are often lasting impressions.)

      3. Must usually be accepted

         Examples: Height, bone structure

      4. May often be altered

         Examples: Diet, makeup, clothing, careful attention to appearance

   B. Emotional characteristics

      1. Reasons for emotions may be the opposite of what they appear to be

         Example: Jealousy of someone's affection does not mean you love the person deeply; it says, instead, that you are insecure about your own worth

      2. Emotions should not be denied but should be released in a positive way

      3. Person should express himself/herself through a few good activities which he/she can do reasonably well

         (NOTE: Many people try to be everything at once: musicians, school political leaders, athletes, scholars, business people, civic leaders, and actors.)

      4. Sometimes it is necessary to be polite and friendly even when a person does not feel like it

IV. Three sides of self (Transparency 1, Assignment Sheet #2)

   A. Person you think you are

   B. Person others think you are

   C. Person you are

INFORMATION SHEET

V. Values of self-respect

(NOTE: Having self-respect is not the same as being selfish, self-centered, or boastful.)

A. Makes it possible to work on self-improvement

B. Makes it easier to respect others

C. Is necessary before others can respect you

VI. Reasons some people have little self-respect

A. We are so familiar with ourselves we tend to take ourselves for granted

B. We tend to minimize what we accomplish

C. We tend to believe others can reach heights we cannot

(NOTE: We should not allow environment to affect our level of self-respect.)

VII. Characteristics of people with little self-respect

A. Rebellious feelings

B. Quiet resentment which builds up until the person blasts back at others

C. Withdrawing from others

D. Anger at himself/herself

VIII. Ways to protect self-respect

(NOTE: The difference is often in the use of "I" instead of "you." A person can state his/her feelings without "being bossy" or offending others.)

A. Communicate feelings to others without giving advice

Examples: "Yes, I do mind. Thank you for asking."

"Driving fast bothers me." instead of "Why don't you slow down!"

"I don't want to break company rules." instead of "You should not take off early when the boss isn't here."

INFORMATION SHEET

B. State plans without whining or threatening others

Example: "If you are late then I'll go ahead and leave for the party,' instead of "If you don't shape up I'm going to be mad." or "Why don't you help me?"

C. Improve relations without putting yourself down

(NOTE: Avoid the "Oh, whatever you want to do" attitude.)

IX. Ways to achieve self-control

A. Work a little longer when you are tired and want to stop working

B. Do not allow small irritations and teasing to bother you much

C. Avoid temptation to do or be what you don't want

X. Ways to show respect for others (Assignment Sheet #3)

A. Show understanding and appreciation of other people's feelings

B. Realize that other people's feelings make sense to them

C. Be aware of other people's feelings as well as to what they are saying

Examples: "Oh, . . . I feel okay" may be said with discouragement
"I . . .I . . . have to go to the dentist tomorrow" may be said with anxiety
"I just saw Joe!" may be said with anger
"All right!" If you say so!" may be said with anger

D. Respond to emotions first

(NOTE: It is hard to "tell it like it is" or to give the straight facts without first hearing a person's emotions.)

Examples: A person says, "We never do things my way."

Responding to emotions first:
"What I hear you saying is that you feel I'm not very thoughtful of you?"

Not responding to emotions first:
"What do you mean? We never do it my way!"

E. Show restraint with obnoxious people

F. Remember birthdays, special occasions, kindnesses shown, and troubled times with visits, cards, or some other kind of token

INFORMATION SHEET

G. Help people feel at ease, important, and useful

   (NOTE: When you become concerned about other people, you forget about yourself. You become at ease with others and, thus, more important and useful to other people.)

H. Find something you can like in any person with whom you must get along

I. Realize that every human being is a worthy individual

J. Return borrowed items promptly to their correct place

K. Remember manners and common courtesies

L. Use the words "we" and "you" more than "i"

   Example: The DECA chapter president may say, "Look what we accomplished" instead of "Look what I accomplished."

XI. Desirable characteristics of employees

(NOTE: The following characteristics were determined by a recent survey of employers in distributive occupations.)

A. Politeness--Courteous, well-mannered, considerate conduct

   Examples: Saying "Good morning" and "Thank you;" escorting, when possible, a customer to a credit department instead of just pointing or giving directions

B. Patience

C. Leaving personal problems at home

D. Punctuality

E. Good attendance

   (NOTE: Excessive absences was the number one problem in the businesses surveyed.)

F. Honesty

G. Neat appearance; good grooming

H. Smiling

I. Not talking too much

   (NOTE: This includes talking on the telephone.)

INFORMATION SHEET

J. Lack of jealousy

K. Positive attitude

L. Tact--Expressing ideas and opinions so that they do not offend others

M. Dependability

N. Perseverance

O. Enthusiasm

P. Interest in job

Q. Assuming responsibility

XII. Ways to handle human relations problems with unpleasant co-workers

A. Wolf

1. Be casual
2. Fail to react

B. Grouch

1. Be pleasant and sympathetic, not taking the grumbling and griping personally
2. Realize that there may be many reasons for crankiness, such as home life, financial problems, and dissatisfaction with himself/herself

C. Bossy person

1. Do not allow the co-worker who is not your supervisor to confuse you and cause conflict by giving you orders
2. Pay attention to details and follow directions as accurately as you can, if your supervisor or a person who influences your supervisor gives you instructions, criticism, or orders

D. Complainer

1. Politely avoid complaining as much as possible because it is contagious
2. Counteract complaints with cheerful, positive statements

INFORMATION SHEET

E. Tattler--Politely but firmly refuse to listen to gossip by suddenly remembering something you have to do and politely dismissing yourself

(NOTE: A person who will tell what someone has said will also repeat what you have said about other people.)

XIII. Overcoming boredom on the job

A. Find things to do, always keeping busy

(NOTE: You may need to ask your employer for additional duties.)

B. Try to do things in a different but efficient way

Example: Make up a game by seeing how many ways you can approach customers without saying "May I help you?"

C. Look at the job or task objectively

(NOTE: People have a tendency to idolize other people and their positions while overlooking opportunities for improvement in themselves and in their position.)

XIV. Using time wisely (Assignment Sheet #4)

A. List things to be done during the day

B. Arrange the list in priorities

(NOTE: It is sometimes helpful to place items first which are hard to accomplish.)

C. Do the tasks in the order on the list

D. Do not be discouraged if not all items are finished during the day

(NOTE: At least the most important items will have been accomplished first.)

XV. What motivates people

A. Person's level of need

(NOTE: Once a person's basic needs have been met, a person is motivated by the next highest level. For example, if a person does not need to worry about food, clothing, and shelter, then the person can give more time and effort to other activities. However, if a person is hungry he will be motivated only by the need for food. If his life is in danger, he will be motivated only by the need for safety.)

INFORMATION SHEET

B. Whatever gives the greatest reward

(NOTE: Sometimes people do things even though they will be punished because subconsciously they are rewarded by the attention they receive.)

C. Praise of the person's work and actions

Examples: "Great," "I like that," "That's interesting," "Good thinking," "Thank you," "Good job," "That's right"

(NOTE: For some reason, praise of a person, such as "You're such a wonderful young man," often makes a person feel guilty because he knows he's not as wonderful as all that.)

XVI. Levels of human needs (Transparency 2)

A. Physiological

Examples: Food, clothing, shelter, rest, exercise, sex

B. Safety

Examples: Security, protection from physical harm

C. Attention

Examples: Love, sense of belonging, friendship, affection, acceptance

D. Esteem

Examples: Self-respect, respect for others, recognition, praise

E. Self-realization

Example: Doing what one can do best

XVII. Benefits of setting goals (Transparency 3)

(NOTE: Goals require perseverance and the ability [illegible] not become discouraged easily. It is recommended that short, intermediate, and long term goals be set.)

A. Give direction and purpose to actions

B. Let person know when he/she has achieved success

INFORMATION SHEET

C. Help bring about desired conditions

(NOTE: Goals should be stated in specific terms.)

Example: Placing in a DECA competitive event is a goal. Happiness is not the goal; it is the resulting condition of a specific goal

D. Create self-confidence by allowing a person to experience a series of small successes

XVIII. Steps for creating a change in attitude (Assignment Sheets #5 and #6)

(NOTE: Some people find it helpful to memorize these steps and to repeat and apply them when they face troublesome circumstances.)

A. Realize that you can change no one but yourself

(NOTE: Therefore, a person must adjust to problem situations or get out of the problem situation.)

B. Smile

C. Say something pleasant once every hour

D. Change negative statements to positive statements

E. Change a negative problem to a positive situation

F. Keep a mental picture of the kind of person you want to be

XIX. Steps to solve problems

A. Define the problem

(NOTE: The real problem may not be what it first appears to be.)

B. List all the possible solutions

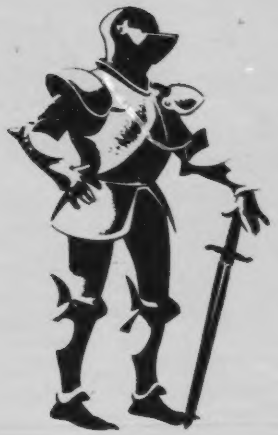
(NOTE: Do not eliminate any possible solution without first thinking about it thoroughly, regardless of how ridiculous it may sound.)

C. Analyze the alternatives

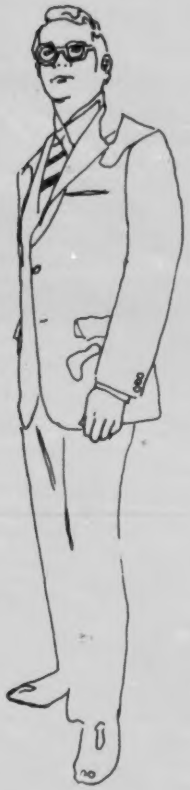
D. Eliminate the alternatives one by one until an answer has been determined

(NOTE: Some people find it helpful to list the alternatives on a sheet of paper in their order of importance to the individual. They also list the pros and cons to each alternative and gradually narrow down alternatives until an answer is determined.)

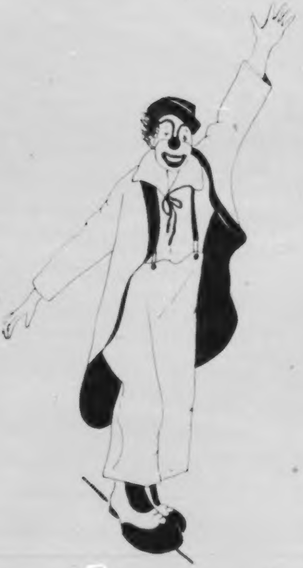
Three Sides of Self



The Person You Think You Are

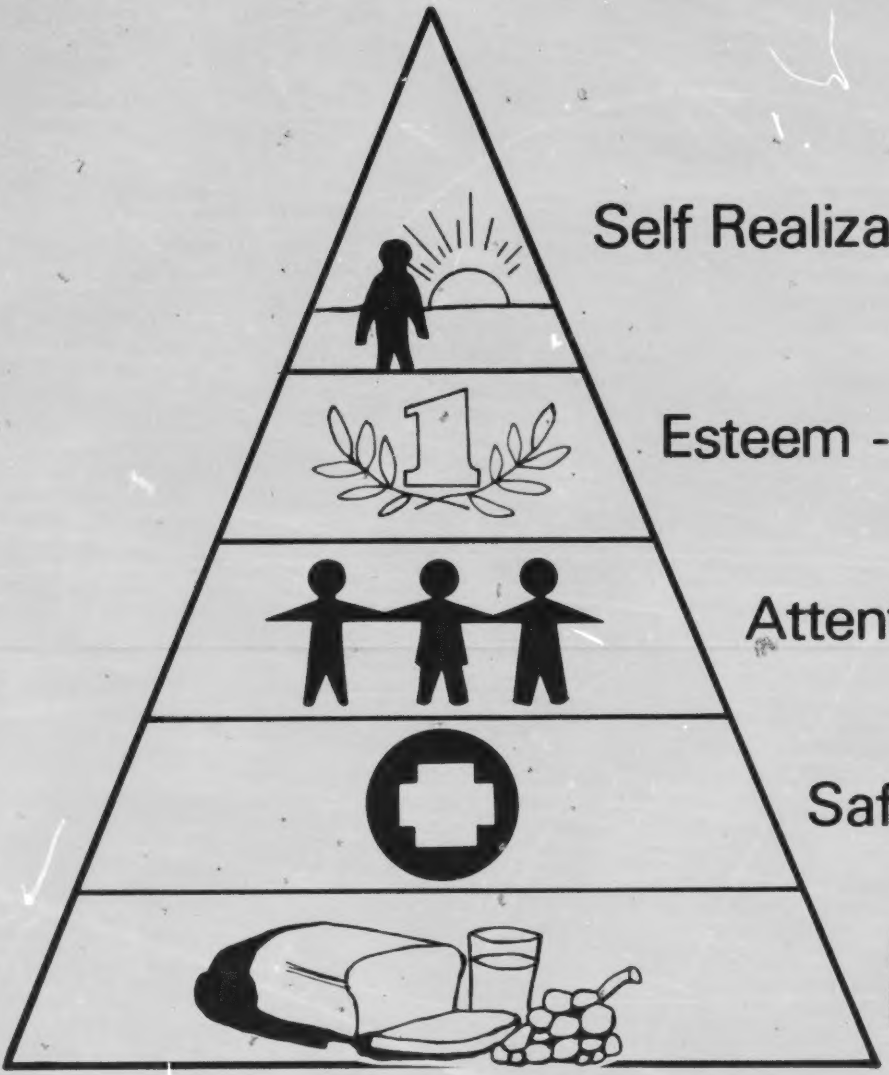


The Person You Are



The Person Others Think You Are

MASLOW'S HIERARCHY OF BASIC NEEDS



Self Realization

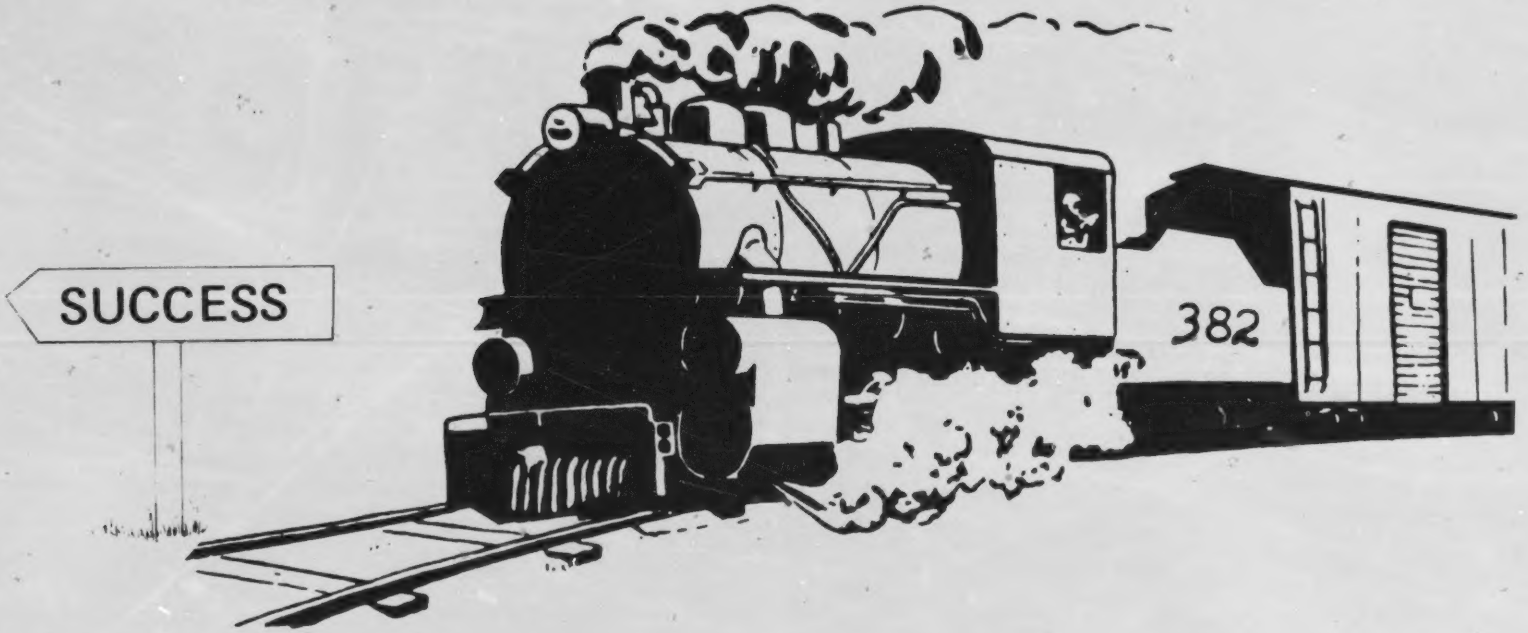
Esteem - Self Respect

Attention - Social Activity

Safety

Basic
Physiological Needs

Goals Keep Us on the Right Track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HUMAN RELATIONS
UNIT I

ASSIGNMENT SHEET #1--GROOMING ANALYSIS

Check the column which best describes your grooming habits. If you need help in any area, discuss the proper solution with someone who understands the problem or find the answer in one of the many good books on grooming, health, and etiquette.

	Do you...	Most of the time	Part of the time	Never
1.	Eat a well-balanced diet?			
2.	Drink plenty of liquids?			
3.	Control your weight?			
4.	Get plenty of sleep at regular hours?			
5.	Get enough physical exercise and fresh air?			
6.	Have regular physical check-ups?			
7.	Have regular dental check-ups?			
8.	Avoid being tempted by unhealthy habits?			
9.	Keep your nails clean, trimmed, and cuticles pushed back?			
10.	Have a regular pedicure?			
11.	Bathe daily?			
12.	Pat your face dry with a clean towel in soft upward strokes?			
13.	Wash hair as needed?			
14.	Use a soap and shampoo appropriate for your skin and hair type?			

ASSIGNMENT SHEET #1

	Do you...	Most of the time	Part of the time	Never
15.	Use an effective deodorant or antiperspirant daily?			
16.	Wear clean undergarments and hosiery daily?			
17.	Clean your face thoroughly?			
18.	Have a clear complexion?			
19.	Keep hands away from face and blemishes?			
20.	Check eyebrows for stray hairs that need to be properly removed to maintain an attractive shape?			
21.	Have your hair cut, styled, or trimmed regularly?			
22.	Wear your hair in a style which is flattering to your profile, height, and shape of face?			
23.	Use dandruff shampoo, rinses, or conditioners if needed?			
24.	Keep your hairbrushes clean?			
25.	Brush teeth at least twice daily?			
26.	Brush teeth with correct strokes?			
27.	Use a breath freshener?			
28.	Use dental floss?			
29.	Check your full view in a mirror before leaving the house?			
30.	Purchase clothes wisely to get much wear out of them?			
31.	Select clothing which goes well with your hair, eyes, and complexion?			

ASSIGNMENT SHEET #1

Do you...	Most of the time	Part of the time	Never
32. Wear clothing with necklines and styles which complement your physical features and which distract from problem areas?			
33. Keep creases in clothes straight?			
34. Keep clothes clean, pressed, and in good repair?			
35. Keep shoes polished and soles and heels repaired?			
36. Wear shoes with good support if you must stand for long periods of time?			
37. Wear complementary accessories and jewelry?			
38. Wear colors which harmonize?			
39. Wear colors and patterns which flatter your shape?			
40. Wear hosiery which is long enough and fits properly?			
41. Clean out your purse or billfold to get rid of unnecessary items?			
42. Protect your skin and hair from sun damage?			
43. Smile frequently, easily, and naturally?			
44. Place cologne or perfume sparingly in places where the scent will last longest?			
45. Sit, stand, and walk with correct posture and feet pointed straight ahead?			
46. Men: Shave or keep facial hair trimmed?			

ASSIGNMENT SHEET #1

	Do you...	Most of the time	Part of the time	Never
47.	Women: Remove hair from arms and legs?			
48.	Women: Apply makeup sparingly and wisely to accent your best features?			
49.	Women: Keep makeup off clothing?			

HUMAN RELATIONS
UNIT I

ASSIGNMENT SHEET #2-DO YOU SEE YOURSELF AS OTHERS SEE YOU?

It is important not only to be your best self but to project a truthful image of your best self. Rate yourself on the following scale and then have someone else rate you as they see you. Look up the meaning of any words which you don't understand. You may wish to repeat the process periodically to check on improvement or to ask other people to rate you. Use a pen or pencil different from the other person doing the rating.

Characteristics	Rating				
Sense of humor	5	4	3	2	1
Poised	5	4	3	2	1
Systematic	5	4	3	2	1
Courteous	5	4	3	2	1
Cooperative	5	4	3	2	1
Apathetic	5	4	3	2	1
Easily impressed	5	4	3	2	1
Pays attention	5	4	3	2	1
Determined	5	4	3	2	1
Extroverted	5	4	3	2	1
Practical	5	4	3	2	1
Creative	5	4	3	2	1
Patient	5	4	3	2	1
Alert	5	4	3	2	1
Perfectionistic	5	4	3	2	1
Pessimistic	5	4	3	2	1
Logical; reasonable	5	4	3	2	1
Leadership qualities	5	4	3	2	1
Impulsive	5	4	3	2	1
Sensible	5	4	3	2	1
Generous	5	4	3	2	1
Sociable	5	4	3	2	1
Tactful	5	4	3	2	1
Rude	5	4	3	2	1
Deceitful	5	4	3	2	1
Considerate	5	4	3	2	1
Sincere	5	4	3	2	1
Forgetful	5	4	3	2	1
Kind	5	4	3	2	1
Inhibited	5	4	3	2	1
Restless	5	4	3	2	1
Possessive	5	4	3	2	1
Irritable	5	4	3	2	1
Loyal	5	4	3	2	1
Selfish	5	4	3	2	1
Thoughtful	5	4	3	2	1
Independent; self-governing	5	4	3	2	1
Emotionally mature	5	4	3	2	1

ASSIGNMENT SHEET #2

Characteristics	Rating				
Self-control	5	4	3	2	1
Obeys rules	5	4	3	2	1
Perseverant	5	4	3	2	1
Economical	5	4	3	2	1
Jealous	5	4	3	2	1
Naive	5	4	3	2	1
Dependable	5	4	3	2	1
Stubborn	5	4	3	2	1
Critical	5	4	3	2	1
Optimistic	5	4	3	2	1
Easily depressed	5	4	3	2	1
Friendly	5	4	3	2	1
Positive	5	4	3	2	1
Ambitious	5	4	3	2	1
Conceited	5	4	3	2	1
Good natured	5	4	3	2	1
Honest	5	4	3	2	1
Sarcastic	5	4	3	2	1
Inferiority complex	5	4	3	2	1
Enthusiastic	5	4	3	2	1
Resourceful	5	4	3	2	1
Intellectual	5	4	3	2	1
Suspicious	5	4	3	2	1
Shrewd	5	4	3	2	1
Sympathetic	5	4	3	2	1
Emotional	5	4	3	2	1
Self conscious	5	4	3	2	1
Domineering	5	4	3	2	1
Argumentative	5	4	3	2	1
Broadminded	5	4	3	2	1
Efficient	5	4	3	2	1
Introverted	5	4	3	2	1
Modest; humble	5	4	3	2	1

HUMAN RELATIONS
UNIT I

ASSIGNMENT SHEET #3--HOW YOU GET ALONG WITH OTHERS

A successful person should know how to get along with others. By the results of this self-test, you will see how you are doing. Check your answers.

1. You meet a person you immediately do not like. You would:
    a. Try to find a topic of conversation of common interest.
    b. Avoid the person.
    c. Try to put him or her in his place.
2. You are offered a job for which you are not fitted. You would:
    a. Admit your inadequacy and offer to learn on the job.
    b. Refuse to try.
    c. Try to bluff through it.
3. When dealing with people, such as salespersons or waitresses, you:
    a. Usually smile and say something pleasant.
    b. Are nice if they are pleasant to you.
    c. Treat them impersonally.
4. You have been overcharged in a store. You would:
    a. Ask the salesperson to recheck the bill.
    b. Pay the bill without saying anything.
    c. Tell the salesperson he has cheated you.
5. When you meet a person who is badly crippled, you:
    a. Treat the person as you would anyone else.
    b. Go out of your way to be especially nice.
    c. Try to avoid him or her.

ASSIGNMENT SHEET #3

6. A friend has just bought a suit which you think is unbecoming. He or she asks if you like it. You would say:

   a. "I think you'll be happy with it."

   b. "How's the weather today?"

   c. "It looks terrible."

7. You honestly feel that you:

   a. Are interested in most people.

   b. Are only really comfortable with your own clique.

   c. Are bored by most people.

8. In a store you are in no hurry, but the person after you is rushed. You:

   a. Suggest that the person go ahead of you.

   b. Make your selection because it is your turn.

   c. Take an extra long time just to calm him or her down.

9. When you meet people of different races or religions, you:

   a. Consider them as human beings much like yourself.

   b. Have a secret feeling of fear.

   c. Are convinced your way of life is superior.

10. After a picnic you find there is no trash basket. You would:

    a. Take the papers, bottles and food home with you.

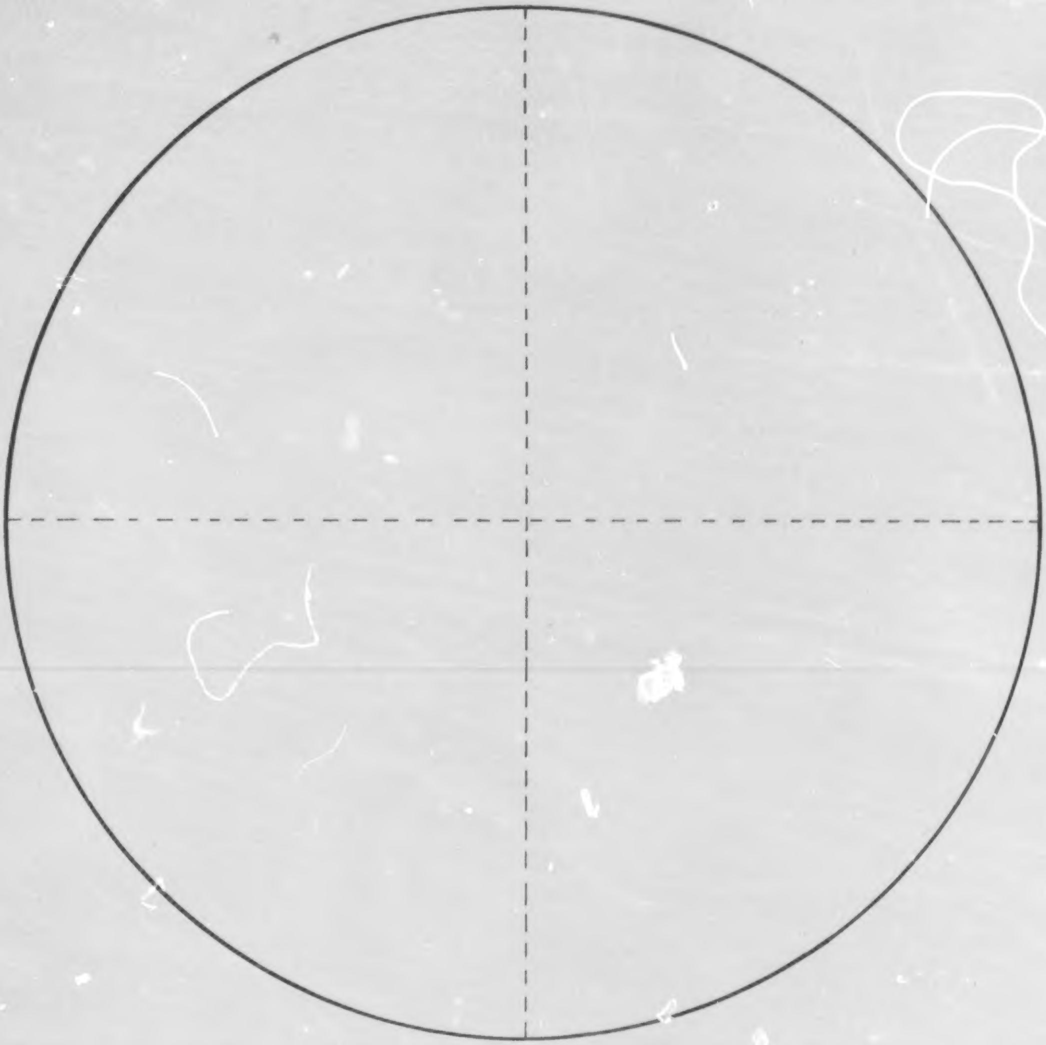
    b. Try to hide the trash on the property.

    c. Leave it on the ground.

HUMAN RELATIONS
UNIT I

ASSIGNMENT SHEET #4--MANAGING YOUR TIME

Estimate the time spent on various activities during a typical day: sleep, grooming, school, work, homework, eating, watching TV, riding around, visiting with friends, talking on the telephone. The estimate of the number of hours need not be exact but should add up to 24 hours. After you have completed the time circle, ask yourself if you can better use your time and how.



HUMAN RELATIONS
UNIT I

ASSIGNMENT SHEET #5--SELF-ANALYSIS

Answer the following questions as they apply to your job and/or classroom experiences honestly by checking the most appropriate column. Then analyze the statements checked "Sometimes" and "Never."

		Never	Sometimes	Always
1.	Are you able to act naturally under all circumstances?			
2.	Do you seek opportunities to meet those in positions of authority?			
3.	Do you avoid criticizing others?			
4.	Are you able to give credit to others for what they do, rather than seek first to obtain credit for yourself?			
5.	Do you try to have a positive attitude?			
6.	Do you have bad breaks?			
7.	Do you approach your work confidently?			
8.	Do you think your friends are more capable than you are at most things?			
9.	Do you try to improve your attitudes?			
10.	Do you feel others are luckier than you are?			
11.	When you fail, do you come right back?			
12.	Do you treat customers and co-workers as though they were important?			
13.	Do you expect to succeed?			
14.	Are you honest?			
15.	Are you willing to accept more responsibility on your job?			
16.	Are you free from bad habits which will impede your progress?			

ASSIGNMENT SHEET #5

		Never	Sometimes	Always
17.	Do you discharge your duties promptly and efficiently and with little or no supervision?			
18.	Do you finish the things you start?			
19.	Do you feel your present job can help you in your future career?			
20.	When you see your friends succeed, do you wish you were doing what they are?			
21.	Do you feel that limitations are things you put on yourself?			
22.	Do you try to appreciate, understand, and show a sincere interest in customers and co-workers?			
23.	Do you try to learn as much as you can at work?			
24.	At work, do you try to be a real service to people on the job?			
25.	Do you try to improve your memory of prices, stock locations, delivery dates, and customers' preferences?			
26.	Do you work to be free from superstitions and prejudices?			
27.	Do you listen attentively to what people say without interrupting them?			
28.	Do you observe closely what is going on around you and understand the significance of it?			
29.	By reading and studying, do you keep informed about current events, your work, your future career, and subjects of popular interest?			
30.	Can you be depended upon to keep your promises to customers and co-workers?			

ASSIGNMENT SHEET #5

		Never	Sometimes	Always
31.	Do you defend from unjust criticism the persons and things (store, merchandise) with which you are identified?			
32.	Do you work toward your goals?			
33.	Do you measure success by money?			
34.	Do you try to achieve one goal at a time?			
35.	Do you believe we become what we think about, what we concentrate on achieving?			
36.	Do you believe the most useful goals are specific goals?			
37.	Do you feel successful people do not have problems?			
38.	Do you worry about past mistakes and failures?			
39.	Do you control your temper?			
40.	Do you often feel enthusiastic about something you wish to do?			
41.	Are you able to make decisions about everyday things easily?			
42.	Are you able to interest yourself in the details of your job?			
43.	Are you careful not to hold grudges against people?			
44.	Do you usually look on the bright side of situations?			
45.	Are you able to work pleasantly with others?			
46.	Do you believe that we receive rewards by giving service to others?			
47.	Do you try to find ways to help other people at work?			

ASSIGNMENT SHEET #5

		Never	Sometimes	Always
48.	Do you believe it is important for a person in business to be civic-minded?			
49.	Do you find your dealings with others at work very frustrating?			
50.	Do you try to be cooperative?			
51.	Do you avoid carrying tales and gossiping about others?			
52.	Do you try to see the other person's point of view?			
53.	Do you refrain from telling others what you think of them?			
54.	Do you avoid arguments?			
55.	Do you avoid making fun of others?			
56.	Do you keep out of other people's business?			
57.	Do you avoid finding fault with everyday little things?			
58.	Do you keep your personal troubles to yourself on the job?			
59.	Do you feel honesty is the way to success?			
60.	Do you really enjoy your work?			
61.	When you feel "down" do you try to work harder?			
62.	Do you think about others on special occasions, such as their birthdays and in sorrow and happiness, and do you send them some expression of your thoughts?			
63.	Do you congratulate your friends upon their achievements?			
64.	Do you learn, remember, and use the names of the people you meet?			
65.	Do you know the rules of etiquette and observe them?			

ASSIGNMENT SHEET #5

		Never	Sometimes	Always
66.	Do you think about the rights of others before you think of your own?			
67.	Do you show respect for everyone regardless of position?			
68.	Are you appreciative for everything one does for you and always thank them?			
69.	Do you believe people who work hard make it unnecessarily difficult on others?			
70.	Do you try to improve?			
71.	Do you want to be like your present friends?			
72.	Do your friends try to operate at their best potential?			
73.	Do you realize how much your friends influence your achievements?			
74.	Are you well groomed?			
75.	Do you do just enough to get by?			
76.	Do you smile often?			
77.	Do you really know that you are a unique and valuable person?			
78.	Do you think about exciting possibilities in your future work?			
79.	Do you try to improve your human relations skills?			
80.	Do you feel you are mature in your attitudes, outlook, and actions?			
81.	Do you try to see yourself as others see you?			
82.	Do you feel you could increase your productivity at work?			

ASSIGNMENT SHEET #5

		Never	Sometimes	Always
83.	Do you feel wanting money is wrong?			
84.	Do you believe there is any value in accumulating wealth?			
85.	Do you believe how much money we earn is determined by how hard it would be to replace us?			
86.	Do you feel it is wrong for your employer to make a profit?			
87.	Do you realize that profit provides jobs?			
88.	Do you try to make every day count?			
89.	Do you jump from one thing to another when trying to accomplish things?			
90.	Do you try to plan your time wisely?			
91.	Do you believe that for every effect there is a cause?			
92.	When there is a problem at work or at school, do you try to be part of the solution?			
93.	Do you get impatient with yourself?			
94.	Are you patient with others?			
95.	Do you feel you will be rewarded in some way if you do well at work or at school?			
96.	Do you refrain from exaggeration?			
97.	Do you avoid flattering people for personal gain?			
98.	Do you try to avoid embarassing others?			
99.	Do you return what you borrow to its proper place?			
100.	Do you accept at least partial blame for failures?			

ASSIGNMENT SHEET #5

		Never	Sometimes	Always
101.	Do you respect your parents, elders, employers, and people in authority?			
102.	Do you have a tendency to try to top a remark made by a previous speaker during a conversation?			
103.	Are you usually ill at ease with strangers?			
104.	Are you critical and bossy?			
105.	Do you ridicule people who are not present?			
106.	Do you laugh at others' mistakes?			
107.	Are you suspicious of other poeple's motives?			
108.	Do you avoid talking about yourself, what you own, and your successes?			
109.	Do you use belittling words and jokes about those with different sex, race, politics, religion, and beliefs?			
110.	Do you believe that successful people frequently ask themselves, "How can I give more service to others?"			
111.	Do you use illness as an excuse for not doing well on a job?			
112.	Do you try not to prejudge customers?			

HUMAN RELATIONS
UNIT I

ASSIGNMENT SHEET #6--SELF-IMPROVEMENT

1. Choose some way in which you want to change or to improve. You may decide to study more industriously or to do a better job in your work. You may decide to work on an emotional or a physical fitness problem. You may decide to diet. Whatever improvement you choose, fill in one of the contracts on the following page. Write your name on the first line of the contract. Fill in the number of days in which the contract is to be in effect. On the line beginning BEHAVIOR write the one change you are going to work on. On the line beginning REWARDS list one or more activities you find most enjoyable to you, for example, purchasing an album or tape, going hunting or skiing, eating chocolate cake and ice cream, playing tennis, going to the basketball game, reading a magazine, riding a bicycle, watching TV, going to a dance, sewing, going shopping, sleeping, calling someone long distance. On the line beginning PENALTIES list one or more of the enjoyable activities you will give up if you do not live up to your contract.

2. Token Rewards--Another way of giving yourself rewards is by the token system. With this system you give yourself a check mark for each hour or day that you live up to your contract. Then you give yourself the reward when you have earned a certain number of check marks. No penalty is needed when you use the token reward system, but you will need a calendar or a progress chart on which to record the check marks you earn. With the token reward system you will fill in the contract in the same way, except that you list the number of check marks you must accumulate in order to earn the reward.

3. This contract should be personal. Fill it out periodically, such as once a week or whenever you record your hours and pay in the DE classroom.

ASSIGNMENT SHEET #6

SELF-IMPROVEMENT CONTRACT

I,______________________________, do hereby enter into the following agreement with myself. I will perform the behavior stated below for a period of__________days. In return, I will receive the rewards listed below.

BEHAVIOR____

REWARDS____

If I fail to live up to this contract, these penalties will take effect.

PENALTIES____

____
Signature

- -

SELF-IMPROVEMENT CONTRACT

I,______________________________, do hereby enter into the following agreement with myself. I will perform the behavior stated below for a period of__________days. In return, I will receive the rewards listed below.

BEHAVIOR____

REWARDS____

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- -

SELF-IMPROVEMENT CONTRACT

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BEHAVIOR____

REWARDS____

If I fail to live up to this contract, these penalties will take effect.

PENALTIES____

____
Signature

HUMAN RELATIONS
UNIT I

ANSWERS TO ASSIGNMENT SHEET #3

Scoring

Give yourself 5 points for every "a" answer, 3 points for every "b" answer, and no points for "c" answers. Add up your score.

Analysis

35 to 50 points: You are very good in your relationship with others because you respect others and greet them with interest and courtesy. You are liked by your friends and those with whom you deal in a casual way.

18 to 34 points: You do very well with others most of the time, but you are sometimes self-centered and forget to put yourself in the other person's shoes. Try working toward more of those "a" answers, and you will find that living is more pleasant than it is now.

0 to 17 points: You are having trouble--either because you are too shy or too aggressive. You know which! Good human relationships are like anything else in life; they take practice. Select someone you know who is truly gracious. Analyze his or her actions, then adapt those traits to your own personality.

HUMAN RELATIONS
UNIT I

TEST

1. Match the terms on the right to the correct definitions on the left by placing the appropriate numbers in the blanks provided.

_____a. Making progress toward achieving a worthy goal

_____b. Recognizing the worth of self and the worth of other people, their property, and opinions

_____c. All the physical, mental, and emotional characteristics that make up a whole person

_____d. Getting along with other people

_____e. Feeling or emotion

1. Human relations
2. Personality
3. Respect
4. Success
5. Attitude

2. Select from the list below reasons for human relations training by placing an "X" in the correct blanks.

_____a. There are less service occupations today

_____b. There are larger businesses today which require more group-oriented activities

_____c. Research proves that good human relations increase productivity

_____d. Business must treat all types of customers equally

_____e. More formality is generally required in business because an authority structure exists

_____f. No more than ten to twenty percent of the management duties are human relations skills

_____g. Ninety percent of all jobs lost are lost due to the inability to get along with people

_____h. Reaching one's goals often depends upon the ability to get along with others

3. Select from the list below true statements about physical and emotional characteristics. Place an "X" in the correct blanks.

______a. Physical characteristics are not important

______b. Physical characteristics affect self-confidence

______c. Physical characteristics must usually be accepted

______d. Physical characteristics may often be altered

______e. Reasons for emotions may be the opposite of what they appear to be

______f. Emotions should be denied

______g. Sometimes it is just necessary to release emotions in a destructive way

______h. It is hypocritical to always be polite and friendly if you don't like someone

4. List the three sides of self.

a.

b.

c.

5. State the values of having self-respect.

a.

b.

c.

6. List two reasons some people have little self-respect.

a.

b.

7. Select from the list below characteristics of people with little self-respect. Place an "X" in the correct blanks.

______a. Rebellious feelings

______b. Humbleness

______c. Quiet resentment which builds up until the person blasts back at others _____d. Self-centered

_____e. Unselfish

_____f. Withdrawing from others

_____g. Anger at himself/herself

8. Name two ways to protect self-respect.

a.

b.

9. List two ways to achieve self-control.

a.

b.

10. Select from the list below ways to show respect for others by placing an "X" in the correct blanks.

_____a. Show understanding and appreciation of other people's feelings

_____b. Realize that other people's feelings make sense to them

_____c. Be aware of other people's feelings as well as to what they are saying

_____d. Respond to emotions first

_____e. Show restraint with obnoxious people

_____f. Remember birthdays, special occasions, kindnesses shown, and troubled times with visits, cards, or some other kind of token

_____g. Help people feel at ease, important, and useful

_____h. Find something you can like in any person with whom you must get along

_____i. Realize that every human being is a worthy individual

_____j. Return borrowed items promptly to their correct place

_____k. Remember manners and common courtesies

11. Select from the list below desirable characteristics of employees by placing an "X" in the correct blank.

_____a. Positive attitude

_____b. Punctuality

______c. Good attendance

______d. Starting at the top

______e. Honesty

______f. Neat appearance

______g. Smiling

______h. Talking a lot

______i. Jealousy

12. Match the descriptions of unpleasant co-workers on the right with ways to handle the human relations problem.

______a. Politely but firmly refuse to listen to gossip by suddenly remembering something you have to do and politely dismissing yourself

______b. Politely avoid complaining as much as possible because it is contagious; counteract complaints with cheerful, positive statements

______c. Be casual; fail to react

______d. Be pleasant and sympathetic, not taking the grumbling and griping personally; realize that there may be many reasons for crankiness, such as home life, financial problems, and dissatisfaction with himself/herself

______e. Do not allow the co-worker who is not your supervisor to confuse you and cause conflict by giving you orders; pay attention to details and follow directions as accurately as you can, if your supervisor or a person who influences your supervisor gives you instructions, criticism, or orders

1. Grouch
2. Bossy person
3. Complainer
4. Tattler
5. Wolf

13. List two ways to overcome boredom on the job.

a.

b.

14. Arrange in order the steps to using time wisely. Place a "1" in front of the first step, a "2" in front of the second, and so on.

_____a. Arrange the list in priorities

_____b. Do not be discouraged if not all items are finished during the day

_____c. Do the tasks in the order on the lists

_____d. List things to be done during the day

15. List two things that motivate people.

a.

b.

16. Arrange in order the levels of human needs. Place a "1" in front of the lowest level, a "2" in front of the next highest level, and so on.

_____a. Esteem

_____b. Self-realization

_____c. Safety

_____d. Physiological

_____e. Attention

17. Select from the list below the benefits of setting goals by placing an "X" in the correct blanks.

_____a. Give direction and purpose to actions

_____b. Let person know when he/she has achieved success

_____c. Help bring about desired conditions

_____d. Create self-confidence by allowing a person to experience a series of small successes

18. List the steps for creating a change in attitude.

a.

b.

c.

d.

e.

f.

19. Arrange in order the steps to solve problems. Place a "1" in front of the first step, a "2" in front of the second, and so on.

_____a. List all the possible solutions

_____b. Define the problem

_____c. Eliminate the alternatives one by one until an answer has been determined

_____d. Analyze the alternatives

HUMAN RELATIONS
UNIT I

ANSWERS TO TEST

1. a. 4
   b. 3
   c. 2
   d. 1
   e. 5
2. b, c, d, e, g, h
3. b, c, d, e
4. a. Person you think you are
   b. Person others think you are
   c. Person you are
5. a. Makes it possible to work on self-improvement
   b. Makes it easier to respect others
   c. Is necessary before others can respect you
6. Any two of the following:
   a. We are so familiar with ourselves we tend to take ourselves for granted
   b. We tend to minimize what we accomplish
   c. We tend to believe others can reach heights we cannot
7. a, c, f, g
8. Any two of the following:
   a. Communicate feelings to others without giving advice
   b. State plans without whining or threatening others
   c. Improve relations without putting yourself down

9. Any two of the following:
   a. Work a little longer when you are tired and want to stop working
   b. Do not allow small irritations and teasing to bother you much
   c. Avoid temptation to do or be what you don't want
10. a, b, c, d, e, f, g, h, i, j, k
11. a, b, c, e, f, g
12. a. 4
    b. 3
    c. 5
    d. 1
    e. 2
13. Any two of the following:
    a. Find things to do, always keeping busy
    b. Try to do things in a different but efficient way
    c. Look at the job or task objectively
14. a. 2
    b. 4
    c. 3
    d. 1
15. Any two of the following:
    a. Person's level of need
    b. Whatever gives the greatest reward
    c. Praise of the person's work and actions
16. a. 4
    b. 5
    c. 2
    d. 1
    e. 3

17. a, b, c, d

18.
    a. Realize that you can change no one but yourself
    b. Smile
    c. Say something pleasant once every hour
    d. Change negative statements to positive statements
    e. Change a negative problem to a positive situation
    f. Keep a mental picture of the kind of person you want to be

19.
    a. 2
    b. 1
    c. 4
    d. 3

PRE-APPROACH, APPROACH, AND DETERMINING NEEDS
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to complete the first three steps in the sales process: pre-approach, approach, and determining needs. The student should accomplish this by selecting from lists the kinds of information a salesperson would need to gather during the pre-approach and true statements about the greeting, service, and merchandise approaches. He/she should be able to tell how to determine the speed with which a salesperson approaches a customer and how to determine the customer's needs. This knowledge will be evidenced by an overall score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with selling to the correct definitions.
2. Arrange in the usual order the eight steps of a sale.
3. Select from a list kinds of information a salesperson would need to gather during the pre-approach step of the sales process.
4. List sources of product information.
5. Select from a list true statements about selling approaches.
6. Select from a list true statements about acknowledging new customers when already busy with a customer.
7. Tell how to determine the speed of approaching a customer.
8. Tell how to determine customer's needs.
9. Select from a list true statements about the use of customers' names.

PRE-APPROACH, APPROACH, AND DETERMINING NEEDS
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

- A. Give pretest using objective sheet.
- B. Order films.
- C. Invite guest speakers.
- D. Provide student with objective sheet.
- E. Provide student with information and assignment sheets.
- F. Make transparencies.
- G. Discuss unit and specific objectives.
- H. Discuss information and assignment sheets.
- I. Give test.
- J. Reteach if necessary.
- K. Test again until minimum standard is reached.

II. Student:

- A. Read objective sheet.
- B. Study information sheet.
- C. Take notes.
- D. Complete assignment sheets.
- E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

- A. Objective sheet
- B. Information sheet

C. Transparency master: TM 1--Eight Steps in a Sale

D. Assignment sheets

1. Assignment Sheet #1--Selling Approaches

2. Assignment Sheet #2--Buying Motives

3. Assignment Sheet #3--Determining Needs

E. Test

F. Answers to test

II. References:

A. Ernest, John W., and Ashmun, Richard D. *Salesmanship Fundamentals.* Dallas, Texas: Gregg Division/McGraw-Hill Book Co., 1973

B. Boole, Yvonne G., and Corey, Joseph A. *Retail Selling.* Dallas, Texas: Gregg Division/McGraw-Hill Book Co., 1972.

C. Richert, G. H.; Meyer, Warren G.; Haines, Peter G.; and Harris, E. Edward. *Retailing Principles and Practices.* 6th ed. Dallas, Texas: Gregg and Community College Division/McGraw-Hill Book Co., 1974.

D. Madson, John H. *Selling Techniques.* Carson City, Nevada: State of Nevada, Department of Education.

E. *The Sales Process.* East Lansing: Michigan State University, Department of Secondary Education and Curriculum.

III. Films:

(NOTE: Only Oklahoma teachers may order films and filmstrips from the State Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth Avenue, Stillwater, Oklahoma 74074. Out-of-state teachers may purchase and/or rent materials from the addresses listed.)

A. "Make It Happen." Available from Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, Illinois 60640.

B. "Second Effort." Available from Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, Illinois 60640.

C. "Is a Sales Career for You?" Available from Counselor Films, Inc., 2100 Locust Street, Philadelphia, Pennsylvania 19103.

D. "Career Opportunities in Retailing." Available from Aims Instructional Media Services, Inc., P.O. Box 1010, Hollywood, California 90028.

PRE-APPROACH, APPROACH, AND DETERMINING NEEDS
UNIT I

INFORMATION SHEET

I. Terms and definitions

   A. Salary--Predetermined amount of pay

   B. Commission--Paying a person a percentage of his/her sales

      (NOTE: A person may be paid a combination of salary and commission.)

   C. Sales quota--Goals or assignments either in dollars or units for a specific period of time

   D. Buying motives--Reasons people buy products

      (NOTE: These reasons are often more emotional than rational or obvious.)

   E. Pre-approach--Preparations for selling

II. Eight steps of a sale (Transparency 1)

   (NOTE: Although a typical sale may follow these steps in this order, it is important for the student to realize that much overlapping may occur. For example, many of the things done during the presentation stage may also answer objections held by the customer and make it possible for the salesperson to close. Suggestion selling may occur earlier in the process and actually be used to help close the sale. It is important, also, to remember that there may be exceptions to the facts stated, such as recommended aproaches and the price range and number of items to show. The students and DE teacher-coordinator(s) should check with local employers for any exceptions.)

   A. Pre-approach

   B. Approach

   C. Determining needs

   D. Presentation

   E. Handling objections

   F. Close

   G. Suggestion selling

   H. Reassurance

INFORMATION SHEET

III. Pre-approach

(NOTE: Customer and product information are important for all salespersons, especially those salespersons who must search for prospective customers outside a store setting, such as insurance salespersons, door-to-door salespersons, industrial salespersons, and wholesalers.)

A. Information needed about a customer

1. Name
2. Address
3. Family
4. Likes and dislikes
5. Time when person is best able to see a salesperson
6. Who makes the decision to purchase

B. Information about your product and business

1. Stock locations
2. Company policies
3. Knowledge of brands, colors, and other important product information
4. Delivery dates
5. Comparison with competitors and their products

IV. Sources of product information

A. Product manuals provided by manufacturers or company sources

B. Leaflets shipped in packing boxes

C. Trade association journals

D. Testing bureau publications

Example: *Consumer Report*

E. Government publications

F. Labels

INFORMATION SHEET

- G. Guarantees
- H. Advertisements
- I. Other salespersons, buyers, and fashion coordinators
- J. Customers

V. Kinds of selling approaches (Assignment Sheet #1)

(NOTE: Most sales are made or lost within the first ten seconds after the customer has been approached by the salesperson.)

- A. Greeting
  - 1. May be used alone with about a four second pause for the customer to respond with his/her need

    Example: "Hello, Mr. Jones."
  - 2. May be used with the other kinds of approaches

    Example: "Good morning, Miss Knight. The camera you were asking about the other day just arrived."
- B. Service
  - 1. Used when extremely busy
  - 2. Used if customer is not looking at anything in particular
  - 3. Should not be used often because people hear "May I help you?" so much that they have a tendency to answer "No" when they actually want help
  - 4. Should be stated in a variety of ways

    Examples: "Have you found what you're looking for?"
    "What may I show you today?"
    "Is anyone helping you?"
- C. Merchandise
  - 1. Proven to be the most effective
  - 2. Used when customer is looking at merchandise

    Example: "Did you notice that the coat is fully lined?"

INFORMATION SHEET

3. Used when customer is not looking at anything in particular

   Examples: "Those digital alarm clocks have been very popular."
   "Our linens are all on sale this week."
   "Have you seen the new style of sweaters that just arrived?"

VI. Acknowledging new customers when already busy with a customer

A. Nod, smile, and/or greet all new customers

Example: A salesperson may say "Someone will be with you in a minute."

(NOTE: "Someone" suggests concern for the second customer without making the first customer feel that you are rushing him/her.)

B. Dismiss yourself courteously from a customer who is just looking, start the second customer looking at some merchandise, and return to the first customer

Example: A salesperson may say to the first customer, " Would you like to look at these three items while I help this other customer?"

(NOTE: The first customer might be near a buying decision, protest, or look annoyed at the question. If so, simply acknowledge the second customer and remain with the first customer.)

C. Avoid trying to help too many customers at once

D. Help customers in the order in which they enter your selling area

VII. Determining speed of approaching a customer

A. Match the customer's pace

(NOTE: Quickly approach those customers who appear to be in a hurry. Approach in an unhurried manner those customers who are not in a hurry.)

B. Never let a customer have to approach you for help

VIII. Determining customer's needs (Assignment Sheets #2 and #3)

A. Ask questions to determine the customer's needs

Example: Ask question about size, style, color, and weight

INFORMATION SHEET

B. Help the customer discover his/her need if it is not yet clearly defined

Example:

Example:	*Customer*:	"This is a beautiful coffee service, but I really don't need it."
	Salesperson:	"Don't you do a lot of entertaining, Mrs. Smith?"
	Customer:	"Yes, I belong to the Green Thumb Garden Club and to the Ruth Circle at church."
	Salesperson:	"This coffee service would make your table look elegant when the clubs meet in your home, don't you think?"
	Customer:	"Yes, it would. How much is it?"

IX. Use of customers' names

A. Learn and use customers' names throughout the sales process

B. Introduce yourself to customers

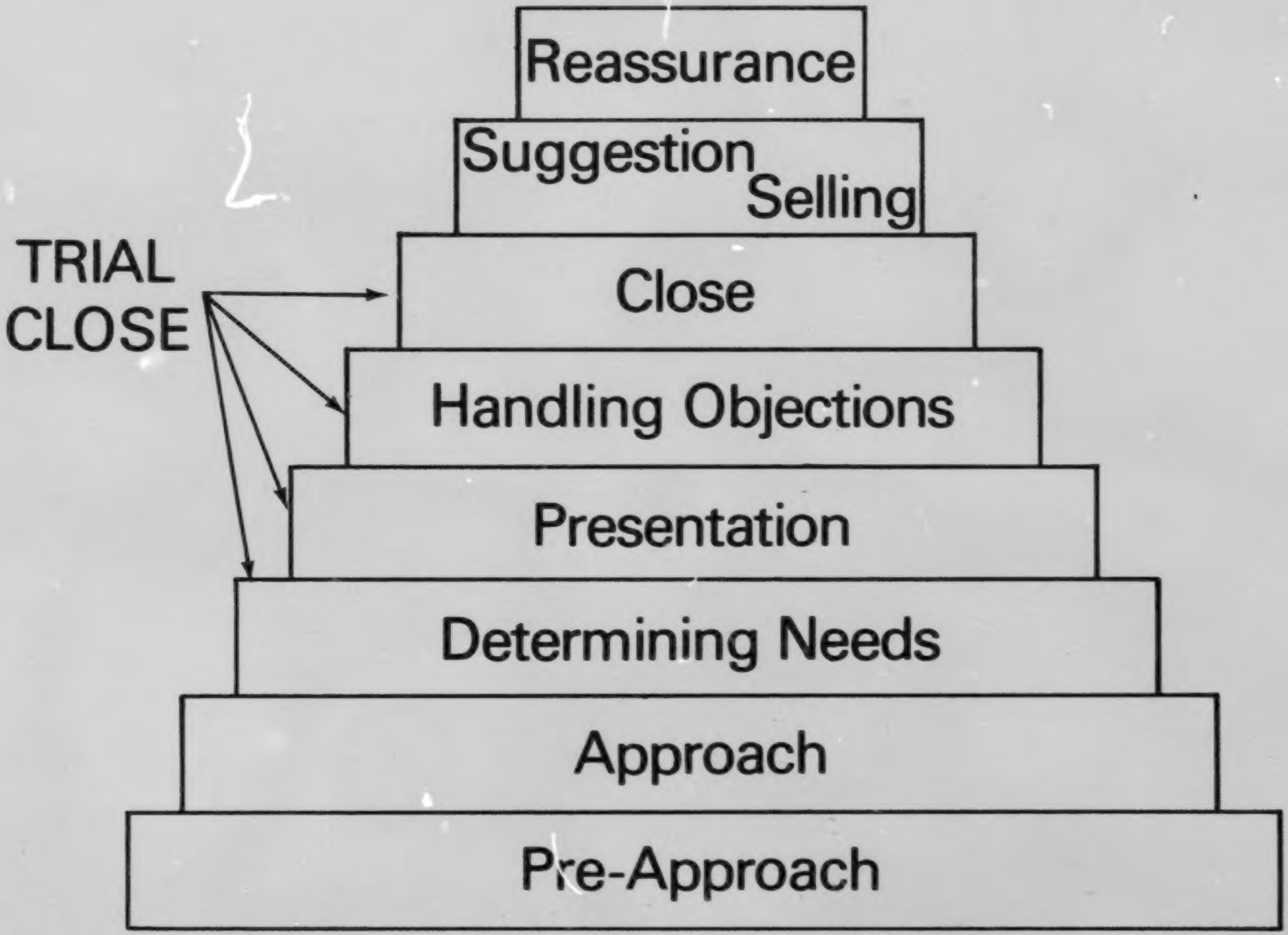
Example: "By the way, my name is Johnny Gogetter."

Salesperson:	"This is the Spanish bedroom suite you saw advertised in the paper, Mr. . . . uh?"
Customer:	"Mr. Gonzales."
Salesperson:	"Mr. Gonzales, notice that you can get all five pieces with a choice of a king or queen size headboard."

C. Learn names from sources such as credit cards, layaway tickets, and delivery slips

Example: After using the credit card and noticing the customer's name, say, "Fine, Mr. Gonzales. We will deliver your furniture on Thursday."

Eight Steps In A Sale



Reassurance

Suggestion Selling

Close

Handling Objections

Presentation

Determining Needs

Approach

Pre-Approach

TRIAL CLOSE

PRE-APPROACH, APPROACH, AND DETERMINING NEEDS
UNIT I

ASSIGNMENT SHEET #1--SELLING APPROACHES

REMEMBER ME?

"I'm the fellow who goes into the restaurant, sits down, and patiently waits while the waiters and waitresses do everything but take my order. I'm the fellow who goes into a department store and stands quietly while the salespersons finish their little chit-chat. I'm the man who drives into a gasoline service station and never blows his horn but waits patiently while the attendant finishes reading his comic book.

"Yes, you might say I'M A GOOD GUY. But do you know who else I am? I am the Fellow Who Never Comes Back, and it amuses me to see you spending thousands of dollars every year to get me back into your store when I was there in the first place; and all you had to do to keep me was to Give Me A Little Service; Show Me A Little Courtesy."

1. Write a merchandise, greeting, and service approach for the following products: a) French poodle, b) popcorn popper, c) shower curtains, and d) headache medicine.

Product: French poodle

a.

b.

c.

Product: Popcorn popper

a.

b.

c.

ASSIGNMENT SHEET #1

Product: Shower curtains

a.

b.

c.

Product: Headache medicine

a.

b.

c.

2. Select three products you sell or would like to sell and write a merchandise approach and combination greeting and service approach for each.

Product:

a.

b.

Product:

a.

b.

Product:

a.

b.

PRE-APPROACH, APPROACH, AND DETERMINING NEEDS
UNIT I

ASSIGNMENT SHEET #2--BUYING MOTIVES

1. Match the buying motives listed on the left to the products on the right by placing the letters of the motives in the blanks of the corresponding products. Remember that a product may appeal to different customers for a variety of reasons. The list of motives and benefits is continued on the following pages.

Example:

Motives

a. Love
b. Comfort
c. Imitation
d. Desire to be handy around the house

Products

a, c Piece of sculpture
a, b, c, d Hedge-trimmer
a, b, c Refrigerator
a, b, c Bedspread

Motives

a. Appetite
b. Love of the opposite sex
c. Love of parents
d. Love of children
e. Economy
f. Comfort
g. Imitation ("Keeping up with the Joneses")
h. Safety
i. Desire to be handy around the house
j. Beauty
k. Desire to be different; recognition
l. Cleanliness
m. Recreation

Products

________ 1. Tie
________ 2. Man's suit
________ 3. Coffee pot
________ 4. Doll
________ 5. Oil painting
________ 6. Correspondence study
________ 7. Fire extinguisher
________ 8. Architect's plans
________ 9. Dress pattern
________ 10. Motorcycle
________ 11. Vitamins
________ 12. Diet bread
________ 13. Basketball

ASSIGNMENT SHEET #2

Motives

n. Desire to make or save money

o. Fear

p. Desire to build

q. Desire to travel

r. Health

s. Competition

t. Sociability

Products

________14. Diamond ring

________15. Air freshener

________16. Drum set

________17. Rental property

________18. Watch

________19. Steak

________20. Iced tea

________21. Nonstick cooking utensils

________22. Bouquet of roses

________23. Box of chocolate candy

________24. French perfume

________25. Pearl necklace

________26. Camera

________27. Living room furniture

________28. Life insurance

________29. Health insurance

________30. Accident insurance

________31. Sports car

________32. Station wagon

________33. Small car

________34. Children's dress shoes

________35. Heating and cooling system

ASSIGNMENT SHEET #2

Products

________36. Door lock

________37. Snow tires

________38. Safety-toed shoes

________39. Battery

________40. Garden tools

________41. Wrench and socket set

________42. Electric saw

________43. Women's costume jewelry

________44. Women's cosmetics

________45. Bath soap

________46. Fabric softener

________47. Stocks and bonds

________48. Model airplane kit

________49. Holy Land tour

________50. Camping trailer

2. List at least five products you sell and the possible motives for buying those products.

   a.

   b.

   c.

   d.

   e.

PRE-APPROACH, APPROACH, AND DETERMINING NEEDS
UNIT I

ASSIGNMENT SHEET #3--DETERMINING NEEDS

Below are some problems where you are to assume the salesperson's role and ask leading questions to find out what the customer needs.

1. Mr. Hill comes into your bookstore and says, "I want to get a book."

2. A lady comes into your electrical appliance store and says, "I want to look at a blender."

3. An elderly housewife comes into your studio and says, "Our children want a picture of my husband and me for Christmas."

4. A man enters your drugstore and says, "Let me have some cough medicine."

5. A man and his son come into your clothing store. The man greets you by saying, "My son wants to get a hat."

ASSIGNMENT SHEET #3

6. A lady comes into your toy department and says, "I should like some type of educational toy for my child."

7. A lady in a bookstore says, "I should like to get some bridge game prizes."

8. A hesitant young man in a dress shop says, "I should like to get a sweater."

9. A student enters your hobby shop and says, "I need a present for someone who likes to make things."

10. A teenager in a cycle shop asks, "Let me see your choppers."

PRE-APPROACH, APPROACH, AND DETERMINING NEEDS
UNIT I

TEST

1. Match the terms on the right to the correct definitions on the left by placing the appropriate numbers in the blanks provided.

_____a. Paying a person a percentage of his/her sales

_____b. Goals or assignments either in dollars or units for a specific period of time

_____c. Predetermined amount of pay

_____d. Reasons people buy products

_____e. Preparations for selling

1. Salary
2. Buying motives
3. Commission
4. Sales quota
5. Pre-approach

2. Arrange in the usual order the eight steps of a sale.

_____a. Determining needs

_____b. Handling objections

_____c. Reassurance

_____d. Approach

_____e. Suggestion selling

_____f. Close

_____g. Pre-approach

_____h. Presentation

3. Select from the list below kinds of information a salesperson would need to gather during the pre-approach step of the sales process. Place an "X" in the correct blanks.

_____a. Customer's name

_____b. Customer's income

_____c. Time when person is best able to see a salesperson

_____d. Who makes the decision to purchase ______e. Stock locations

______f. Company policies

______g. Knowledge of brands, colors, and other important product information

______h. Delivery dates

4. List two sources of product information.

a.

b.

5. Select from the list below true statements about selling approaches. Place an "X" in the correct blanks.

______a. "May I help you?" is one of the most effective approaches

______b. Greeting statement may be used alone with about a four second pause for the customer to respond with his/her need

______c. Greeting approach may be used with other kinds of approaches

______d. Merchandise approach is the least effective approach

______e. Service approach may be used when extremely busy

______f. Service approach should be stated in a variety of ways

______g. Service approach is used best when a customer is looking at merchandise

6. Select from the list below true statements about acknowledging new customers when already busy with a customer. Place an "X" in the correct blanks.

______a. Nod, smile, and/or greet all new customers

______b. Casually walk away from the "just looking" customer without saying anything

______c. Help friends and customers who look like they will make the largest purchase first

______d. Avoid trying to help too many customers at once

7. Tell how to determine the speed of approaching a customer.

8. Tell how to determine customer's needs.

9. Select from the following list true statements about the use of customers' names. Place an "X" in the correct blanks.

______a. Customer will think a salesperson is pushy and impersonal if the salesperson learns and uses the customer's name

______b. Introduce yourself to customers

______c. Learn names from sources such as credit cards, layaway tickets, and delivery slips

PRE-APPROACH, APPROACH, AND DETERMINING NEEDS
UNIT I

ANSWERS TO TEST

1. a. 3
   b. 4
   c. 1
   d. 2
   e. 5

2. a. 3
   b. 5
   c. 8
   d. 2
   e. 7
   f. 6
   g. 1
   h. 4

3. a, c, d, e, f, g, h

4. Any two of the following:
   a. Product manuals provided by manufacturers or company sources
   b. Leaflets shipped in packing boxes
   c. Trade association journals
   d. Testing bureau publications
   e. Government publications
   f. Labels
   g. Guarantees
   h. Advertisements
   i. Other salespersons, buyers, and fashion coordinators
   j. Customers

5. b, c, e, f

6. a, d

7. a. Match the customer's pace

   b. Never let the customer have to approach you for help

8. a. Ask questions to determine customer's needs

   b. Help the customer discover his/her need if it is not yet clearly defined

9. b, c

PRESENTATION
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to complete the presentation stage of the sales process. The student will accomplish this through selecting from lists statements about how to show merchandise, what to say about the merchandise, and how to talk about price. The student should also be able to discuss how much merchandise to show at one time and where to focus attention when the customer is not alone. He/she should be able to tell how to handle statements about competitors and to state ways to recognize and help different types of customers. This knowledge will be evidenced by an overall score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Select from a list true statements about how to show merchandise.
2. Select from a list true statements about what to say about the merchandise during a sales presentation.
3. Select from a list true statements about how to talk about price.
4. Discuss factors affecting how much merchandise to show at one time.
5. Discuss where to focus attention in the following situations when the customer is not alone: with friends who influence the customer, husband and wife together, group of people, and parents with children.
6. Tell how to handle statements about competitors.
7. State ways to recognize and ways to help the following types of customers: impulsive customer, deliberate customer, undecided customer, decided customer, very talkative customer, silent customer, and know-it-all customer.

PRESENTATION
UNIT II

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:
    A. Give pretest using objective sheet.
    B. Order films.
    C. Invite guest speakers.
    D. Provide student with objective sheet.
    E. Provide student with information and assignment sheets.
    F. Pantomime sales demonstrations using only gestures and demonstrations.
    G. Make transparencies.
    H. Discuss unit and specific objectives.
    I. Discuss information and assignment sheets.
    J. Give test.
    K. Reteach if necessary.
    L. Test again until minimum standard is reached.

II. Student:
    A. Read objective sheet.
    B. Study information sheet.
    C. Take notes.
    D. Pantomime sales demonstrations.
    E. Complete assignment sheets.
    F. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:
    A. Objective sheet
    B. Information sheet

C. Transparency masters

1. TM 1--Involving the Customer
2. TM 2--Don't Pick up Bad Habits
3. TM 3--Give Your Customer Red-Carpet Treatment

D. Assignment sheets

1. Assignment Sheet #1--Showing and Talking About Merchandise
2. Assignment Sheet #2--Benefit and Feature Selling
3. Assignment Sheet #3--Interpreting Customer's Personality and Needs
4. Assignment Sheet #4--Handling Customers Tactfully

E. Test

F. Answers to test

II. References:

A. Ernest, John W., and Ashmun, Richard D. *Salesmanship Fundamentals.* Dallas, Texas: Gregg Division/McGraw-Hill Book Co., 1973

B. Boale, Yvonne G., and Coney, Joseph A. *Retail Selling.* Dallas, Texas: Gregg Division/McGraw-Hill Book Co., 1972.

C. Richert, G. H., Meyer, Warren G., Haines, Peter G., and Harris, E. Edward. *Retailing Principles and Practices.* 6th ed. Dallas, Texas: Gregg and Community College Division/McGraw-Hill Book Co., 1974.

D. Madson, John H. *Selling Techniques.* Carson City, Nevada: State of Nevada Department of Education.

E. *The Sales Process.* East Lansing: Michigan State University, Department of Secondary Education and Curriculum.

III. Films:

(NOTE: Only Oklahoma teachers may order films and filmstrips from the State Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth Avenue, Stillwater, Oklahoma 74074. Out-of-state teachers may purchase and/or rent materials from the addresses listed.)

A. "Make It Happen." Available from Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, Illinois 60640.

B. "Second Effort." Available from Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, Illinois 60640.

C. "Is a Sales Career for You?" Available from Counselor Films, Inc., 2100 Locust Street, Philadelphia, Pennsylvania 19103.

D. "Career Opportunities in Retailing." Available from Aims Instructional Media Services, Inc., P.O. Box 1010, Hollywood, California 90028.

PRESENTATION
UNIT II

INFORMATION SHEET

I. How to show merchandise (Assignment Sheet #1)

(NOTE: Try to make a lasting friend out of each customer. Be sincere, honest, and respectful to each person who enters your business. After all, the customers are your reason for being in business.)

A. Handle merchandise respectfully to show that it has value

B. Hold merchandise with as little of your hands showing as possible

(NOTE: Observe how products are held on television commercials.)

C. Hold small items at eye level

D. Show merchandise against a complementary background

Example: You might show a diamond ring against a black velvet cloth with a bright light shining on the jewelry

E. Show merchandise as it would be used

Examples:
Tie placed against a shirt
Furniture placed in a model room
Stereo playing an album

F. Keep your eyes on the customer's face, glancing momentarily at the feature you are pointing out and then back again to the customer

(NOTE: Some salespeople use a pen or pencil to help point out features.)

G. Get the product into the customer's hands as soon as possible

(NOTE: This gives the customer a feeling of ownership.)

Examples:
Encourage the customer to try on clothing
Ask the customer to open drawers and doors
Let the customer read brochures and pamphlets

H. Involve as many of the five senses as possible (Transparency 1)

1. Sight
2. Touch

INFORMATION SHEET

3. Hearing

4. Taste

5. Smell

I. Avoid excesses in all phases of a presentation

(NOTE: Elaborate dress, too many gestures, or too many questions may ruin a sales presentation.)

II. What to say about the merchandise during the sales presentation

A. Sell the benefits of the product that meet the customer's needs rather than the product features alone (Assignment Sheet #2)

(NOTE: The words "you" and "yours" used with benefit selling make it even more effective because it personalizes the feature for the customer.)

B. Create pictures in the customer's mind of him/her using the product

Examples: "Mr. Snow, you can really glide down the slopes quickly and easily with these skis."

"Imagine yourself at Lake Tenkiller with fish jumping all around and you sitting right in the middle of it with this new bass boat."

C. Refer back to statements made by the customer

Example: "As you said, Mrs. Green, this style coffee pot will be easier to clean."

D. Use descriptive words and phrases

E. Avoid degrading, annoying, or trite words and phrases (Transparency 2)

Examples: Do you understand? -- Know what I mean? -- Get the idea?-- Don't you know? -- honey -- dear -- friend -- pretty -- beautiful -- nice -- fine -- cheap

F. Avoid using words too technical for the customer

G. Support statements with facts and figures whenever possible

H. Use charts, pamphlets, and posters when available to illustrate benefits

INFORMATION SHEET

I. Talk as if you anticipate the customer will buy, not as if you have just a faint hope that he/she might buy

Examples: "When you have used this a few days, you will not part with it for five times the cost" is more effective than "If you purchase this, you'll wonder how you ever got along without it."

"Rosemary, what color do you prefer?" is more positive than "You wouldn't want this color would you?"

J. Ask a series of short questions to which a customer can answer "yes"

(NOTE: This will put the customer in a positive frame of mind.)

Example:
Salesperson: "You want a portable TV that your wife and children may carry easily from room to room?"
Customer: "That's right."
Salesperson: "Pick this one up. Isn't it light? It only weighs sixteen pounds."
Customer: "Yes, it is lightweight."
Salesperson: "Isn't that a clear picture? Notice how easily the colors adjust to give you a true, bright picture."
Customer: "Uh huh."

K. Nod your head "yes" when asking a question for which you hope to receive a positive response

L. Never argue or sound rude with a customer (Transparency 3)

M. Do not judge a customer by the way he/she is dressed (Assignment Sheet #3)

N. Use the word "you" and "let's" more than "I" during the presentation

(NOTE: "Let's" is a powerful word because it implies "you and me together," making the customer feel that he/she is not alone in the buying decision.)

O. Use references of people admired in some way by the customer, such as friends, community leaders, or famous personalities

(NOTE: This is often enough to allow the salesperson to go ahead and close the sale.)

Example:
Salesperson: "You know Mrs. Bloomfield who lives down the street from you?"
Customer: "Yes, we both belong to Leavenworth PTA."

INFORMATION SHEET

Salesperson: "Well, Mrs. Bloomfield bought Secky brand hose and says she wouldn't wear any other brand now."

Example: **Salesperson**: "I have one of these hair stylers, and I've been so satisfied that I gave one just like it to my brother."

III. How to talk about price

A. Generally let the customer mention price first

(NOTE: An exception would be if economy is one of the customer's main buying motives.)

B. Always support price with a positive statement

Examples: "Only $9.95."

"You get all these features for just $49.88."

C. Generally show medium priced merchandise first if the customer does not indicate any particular price range

D. Show higher priced merchandise if only two price ranges exist

E. Show larger quantities if no preference is stated

Examples: "Would you like me to fill it up with ethyl?"
"You want a large coke?"
"Would you like that with fries?"

IV. Factors affecting how much merchandise to show at one time

A. Generally show no more than three items at one time in most situations

B. Remove items from the customer's view as she/he indicates a lack of interest

C. Replace unwanted items with other items in which the customer may be interested

D. Gradually narrow the selection until a buying decision is made

V. Presentations when the customer is not alone

A. With friends who influence the customer--Concentrate on the friend and together you will help the customer meet his/her buying needs

B. Husband and wife together--Sell to the leader

Example: In buying a car the husband may make the decision on the motor size and the wife may be the leader on deciding the color of the car

INFORMATION SHEET

- C. Group of people--Concentrate on the leader
- D. Parents with children--Realize that children often influence their parents on what to buy

VI. How to handle statements about competitors

- A. Do not criticize competitors or their products
- B. Refer a customer to another store if there is no way to get the product for the customer within a reasonable period of time

VII. Recognizing and helping different types of customers (Assignment Sheet #4)

- A. Impulsive customer
  - 1. How to recognize
    - a. Wants to buy quickly
    - b. Doesn't want detailed information
    - c. Changes mind frequently
  - 2. How to help
    - a. Give quick service
    - b. Give quick, to-the-point answers
- B. Deliberate customer
  - 1. How to recognize
    - a. Is slow and careful
    - b. Is a good listener
    - c. Wants merchandise facts and demonstrations
    - d. Likes to see a variety of merchandise for comparison
    - e. May be hard to please
  - 2. How to help
    - a. Show merchandise with information and demonstration
    - b. Show a variety of merchandise and guide the comparisons
    - c. Don't rush decisions

INFORMATION SHEET

C. Undecided customer

   1. How to recognize

      a. Usually knows need but is uncertain on what will satisfy the need

      b. Needs suggestions

      c. Needs assurance that the right decision is being made

   2. How to help

      a. Don't show too large an assortment

      b. Show, explain, and demonstrate

      c. Give honest compliments to build confidence

      d. Help without forcing a decision

D. Decided customer

   1. How to recognize

      a. Tells exactly what he/she wants

      b. Likes to make the decision by himself/herself

      c. Likes to do the talking

   2. How to help

      a. Show the merchandise quickly

      b. Tell customer if merchandise is not available and quickly point out the benefits of a suitable substitute

E. Very talkative customer

   1. How to recognize

      a. Likes to talk

      b. Is very friendly

      c. Wanders off the subject of the product

   2. How to help

      a. Respond in a friendly manner

      b. Try to keep the conversation on the subject

INFORMATION SHEET

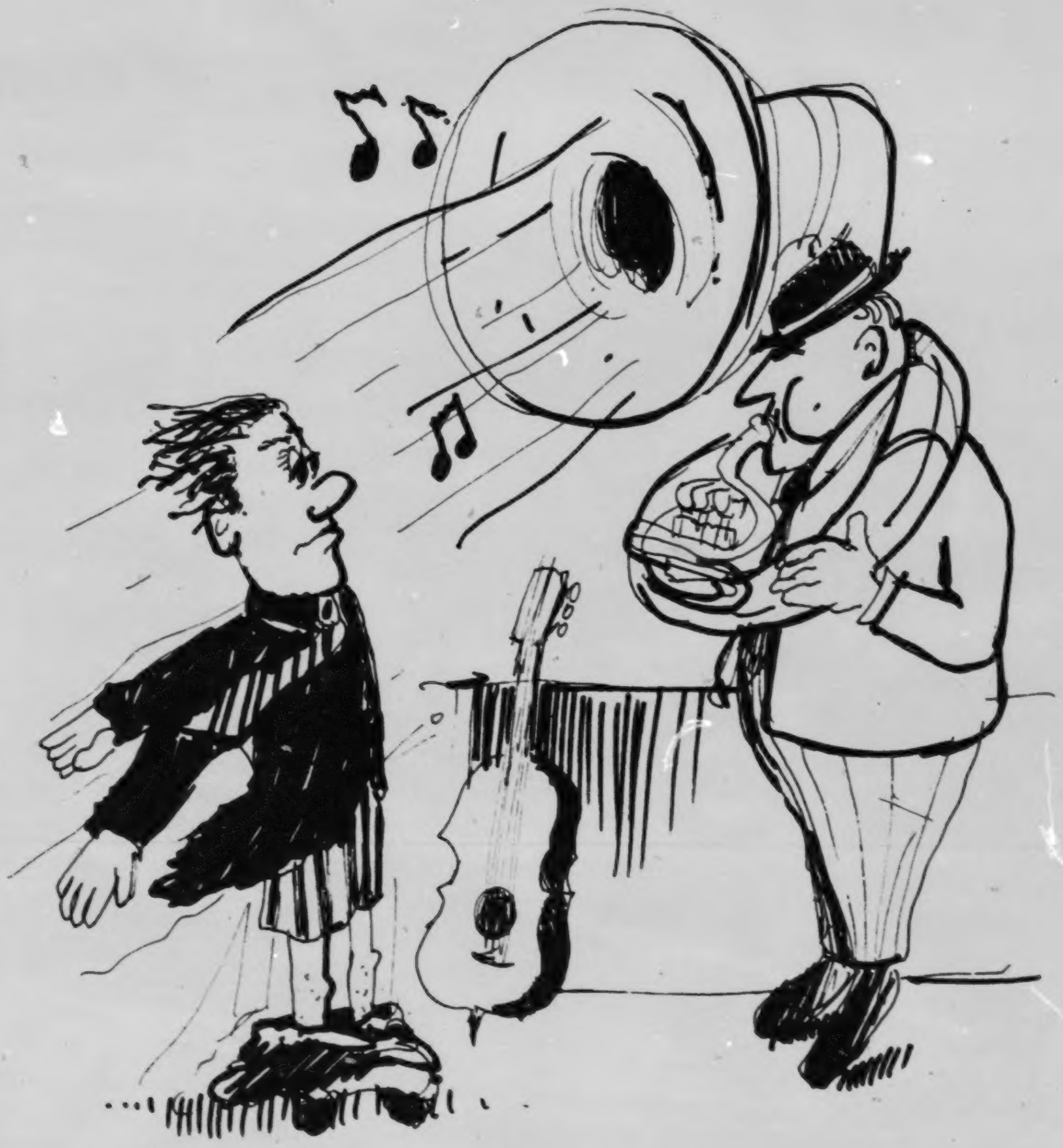
F. Silent customer

1. How to recognize
    a. Is not enthusiastic
    b. Does not seem to want to make a decision
    c. May not seem to pay much attention
    d. May listen but not comment
2. How to help
    a. Try to draw customer out by questioning
    b. Watch customer carefully for any signs of interest
    c. Avoid talking too much, but do not allow conversation to lag

G. Know-it-all customer

1. How to recognize
    a. Discredits all information given
    b. Is disagreeable
2. How to help
    a. Disarm the customer by not offering the resistance he/she expects
    b. Agree with the customer whenever possible
    c. Get in selling points by elaborating on those features considered important by the customer
    d. Appeal to customer's vanity by asking questions
    e. Let the customer do the talking
    f. Guard your remarks to keep from antagonizing the customer
    g. Let the customer make his/her own decision without letting him/her think that your help is needed

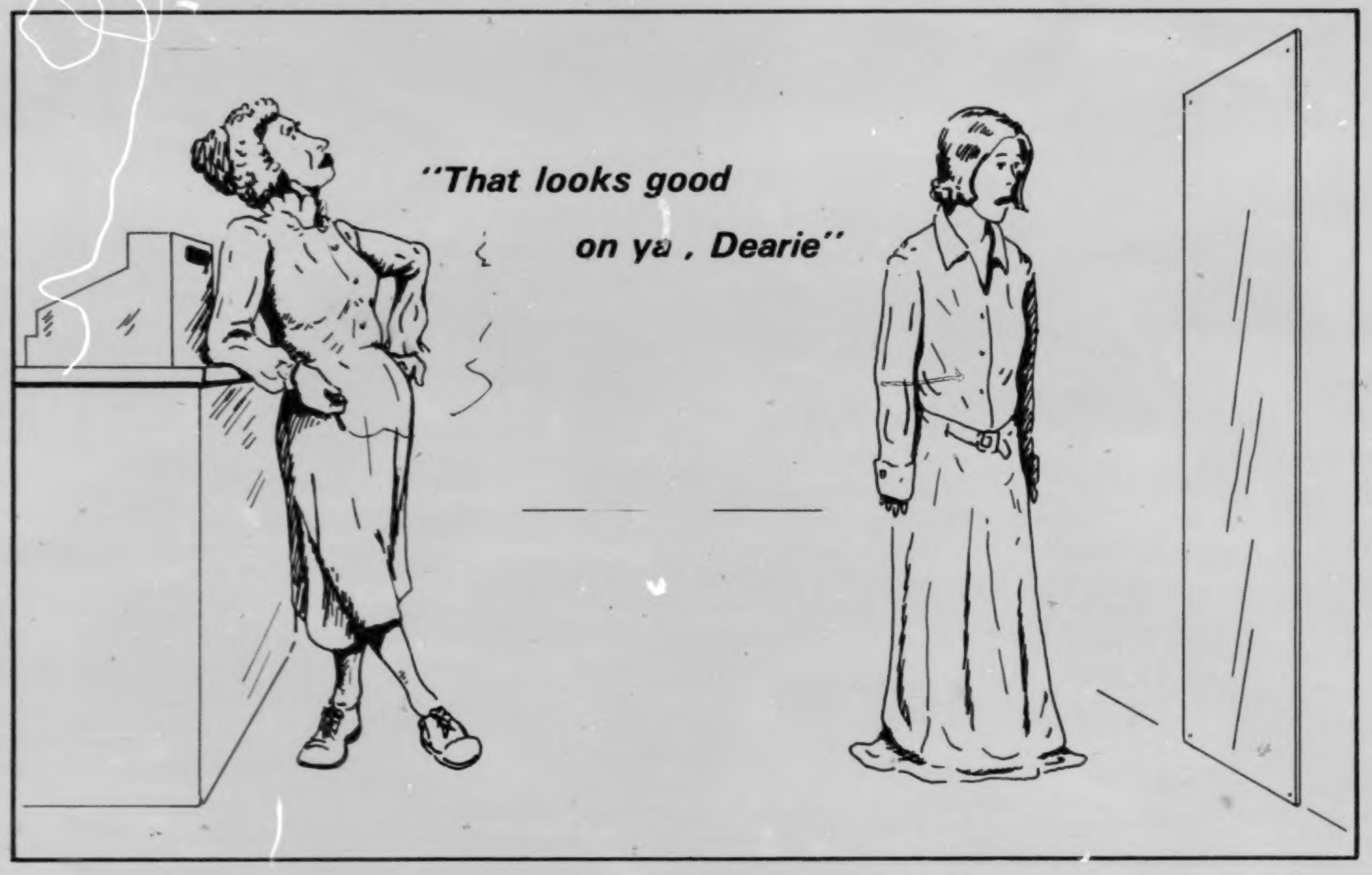
Involving the Customer



Involving the Customer Helps to
Give Him the Feeling of Ownership

TM 1

Don't Pick Up Bad Habits


"That looks good
on ya , Dearie"

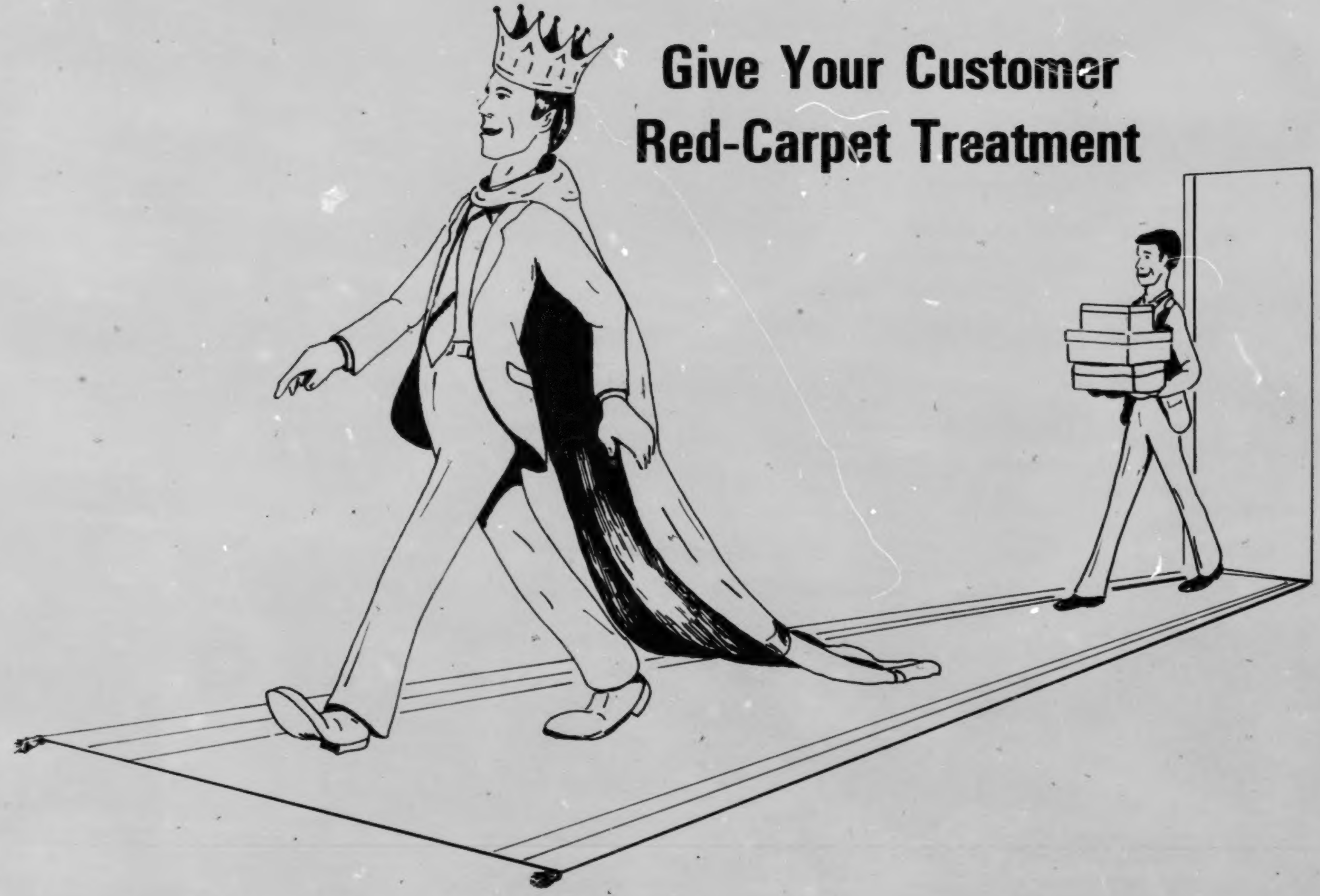
TM 2

4 1 1

4 1 2

DE II - 43-D

Give Your Customer Red-Carpet Treatment



PRESENTATION
UNIT II

ASSIGNMENT SHEET #1--SHOWING AND TALKING ABOUT MERCHANDISE

Complete these activities using the following products: a) cut flower arrangement, b) wrist watch, c) underwear, d) flavor-of-the-month ice cream, e) tires, f) cosmetics, g) toy, h) electric drill, i) jeans, j) car, and k) a no-iron shirt.

1. Write selling sentences that would create pictures in the customer's mind of each of the products being used.

   a.

   b.

   c.

   d.

   e.

   f.

   g.

   h.

   i.

   j.

   k.

2. Tell how you would involve as many of the senses as possible in selling each of the products.

   a.

   b.

ASSIGNMENT SHEET #1

c.

d.

e.

f.

g.

h.

i.

j.

k.

3. List three products you sell or would like to sell and answer the previous questions about those three products.

    a. Selling sentences

        1)

        2)

        3)

    b. Involving the senses

        1)

        2)

        3)

PRESENTATION
UNIT II

ASSIGNMENT SHEET #2--BENEFIT AND FEATURE SELLING

1. Place a "B" in front of the benefit statements and an "F" in front of the feature statements.

______a. These fireplace accessories are polished brass.

______b. You can wear this outfit many ways.

______c. You will enjoy this dress because you will spend a lot less on cleaning bills.

______d. Because of the water treatment, this coat will keep you protected from the rain at all times.

______e. This is good hardwood panelling.

______f. You may get these towels monogrammed with the couple's initials for a lovely personalized gift.

______g. This dress is dacron and cotton.

______h. Your children will enjoy these ABC books while learning the alphabet.

______i. This coat will be a flexible addition to your wardrobe and will travel anywhere.

______j. This carpet of 100% polypropylene fiber will give you extra wear, and it is easy to clean.

______k. These storm windows are 38 x 44 inches.

______l. This exercise machine is made of aluminum.

______m. This sewing machine makes professional buttonholes of any length without turning the fabric. It's so easy!

______n. This pool table has four leg levelers which assure you of good true table balance and a true roll.

______o. Your shag carpet will come clean with this beater bar feature that powers out hidden dirt.

______p. This vacuum has a convenient carrying handle, toe-touch on/off switch, automatic cord rewind, and carries a complete set of tools on the cannister. These features will make your vacuuming easier.

______q. The power return automatically brings the carriage back to the typing line and, thus, will increase your typing speed and efficiency.

ASSIGNMENT SHEET #2

2. List at least five products you sell or would like to sell and write selling sentences about the products' benefits.

   a.

   b.

   c.

   d.

   e.

PRESENTATION
UNIT II

ASSIGNMENT SHEET #3--INTERPRETING CUSTOMER'S PERSONALITY AND NEEDS

In the blanks provided place an "A" if you agree and a "D" if you disagree with the statements following.

_____ 1. It is a mistake for any salesperson to assume that the initial attitude demonstrated by a customer indicates his/her interest or lack of interest in making a purchase.

_____ 2. A customer has demanded that you replace a product that he feels is defective. You have told him that the product guarantee requires the purchaser to return the product to the manufacturer for repair or replacement. Several other customers are aware of the problem you are experiencing but are also becoming anxious to be waited on. Your supervisor is on his break and in order to serve the other customers and avoid more trouble you decide to honor this customer's demand.

_____ 3. Mr. Nelson told you that he is "just looking" and there are several other customers in your department. You should concentrate on the others and let Mr. Nelson approach you if he decides he would like any help.

_____ 4. In order to appear to be knowledgeable about your store and its operation, you tell Mr. Dabney that an item that is presently sold-out will probably be in within five days.

_____ 5. You should encourage the sale of the more expensive of two equal quality products to Mr. Rumfield, a new customer to your store, as you realize that the volume of sales is important to the success of any business.

_____ 6. The combination of selling techniques used in producing each sale will vary and depend upon the individual customer and his/her individual needs.

_____ 7. A customer in the automotive parts store where you work appears to already know the individual selling points of the different brands of seat covers that you have on display. Assuming that he is comparing prices among different stores, your courtesy and ability to sell may be the only factor that can produce a sale.

_____ 8. A middle-aged gentleman enters the "Mod Mall" of Frank's Men's Shop where you are employed. You probably will not sell him anything as the styles in this department are geared for high school and college students.

ASSIGNMENT SHEET #3

_____ 9. If a customer is argumentative or indifferent it is probably because he/she does not like you.

_____10. You are very busy with a department inventory that must be completed by closing time (one-half hour). An elderly lady approaches you to ask where she can find a product. You do not know for certain in which department the product would be located and you are very pressed for time. It is alright to tell her you are sorry but the product is not in your department and direct her to the department that will "probably" have it.

PRESENTATION
UNIT II

ASSIGNMENT SHEET #4--HANDLING CUSTOMERS TACTFULLY

Tell how you would handle the following customers.

1. Impulsive Irma: "I want to buy some green stationery; no, I want tan stationery. They look like the same quality paper; I think I'll take the green stationery."

2. Deliberate Debbie: "I want a pet for my elderly mother. What kinds of puppies do you have? Do you have pedigree animals or any pets that can already perform tricks?"

3. Undecided Eunice: "I need some decorations for a children's party, but I don't know what kids nine years old like today. Do you think that a boy would like these clown decorations?"

4. Decided Delbert: "I want the exercise machine that is a stationery bicycle with twenty pounds of tension and an adjustable padded seat. That's what I want, but you don't have it."

5. Talkative Teri: "I need an electric can opener. Hey, did you see all the nice things Ruby Jewel got at her bridal shower? I particularly liked those cute salt and pepper shakers, but the matching cookie jar and napkin holders were nice, too. And do you know where they went on their honeymoon?"

6. Silent Sam: "I just don't know . . . . "

7. Know-It-All Ned: "That is not a good quality leather. It is more important to have a hard leather. I know because I've been buying leather goods in here since before you were born. I know what's good and what isn't."

PRESENTATION
UNIT II

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #2

1.
   - a. F
   - b. B
   - c. B
   - d. B
   - e. F
   - f. B
   - g. F
   - h. B
   - i. B
   - j. B
   - k. F
   - l. F
   - m. B
   - n. B
   - o. B
   - p. B
   - q. B
   - r. B

Assignment Sheet #3

1. Agree--Don't prejudge. This attitude may be misunderstood by the customer to mean aggressiveness or lack of interest in serving him.

2. Disagree--This is an extremely difficult situation. The customer may simply be trying to bully you by creating a disturbance. REMAIN CALM but insist that you are unable to accommodate him in this way. Suggest that he may wait until the supervisor returns if this is the only way he feels he can be helped or offer to give him the mailing address for the company if he doesn't have it.

3. Disagree--If nothing more, simply keep eye-contact with Mr. Nelson so that if he does discover he needs help or information you can be Johnny-on-the-spot.

4. Disagree--If Mr. Dabney comes in five days later and the merchandise is not yet available he will probably be unhappy. Offer to check with your supervisor in order to save him an extra trip or volunteer to call him when product is received.

5. Disagree--You may destroy future goodwill and sales profit if Mr. Rumfield later discovers he could have purchased the same quality for less money.

6. Agree--Each of us as individuals responds to different and individual approaches. The successful salesperson carefully but discretely studies his/her customers and develops each sale to meet individual needs.

7. Agree--When price and quality are the same or in some instances when price and quality are not the same, customers will be influenced by the personality of the salesperson, his/her sincerity, courtesy, and ability to sell the product.

8. Disagree--Don't prejudge a customer or the probability of a sale. It is a negative approach in any case.

9. Disagree--The salesperson can not allow himself/herself to question his/her own ability or attitude. Customers will surely see this and lose faith in the ability of the salesperson to help them.

10. Disagree--The customer is the main reason for the business to operate. Explain that you are uncertain but volunteer to locate the product or find another salesperson who can help this customer. This customer may already have tried another salesperson or been unable to find someone else to help her. Unless you take action that is certain to satisfy her need she may give up and leave the store.

Assignment Sheet #4

1. a. Give quick service
   b. Give quick, to-the-point answers
2. a. Show merchandise with information and demonstration
   b. Show a variety of merchandise and guide the comparisons
   c. Don't rush decisions
3. a. Don't show too large an assortment
   b. Show, explain, and demonstrate
   c. Give honest compliments to build confidence
   d. Help without forcing a decision
4. a. Show the merchandise quickly
   b. Tell customer if the merchandise is not available and quickly point out the benefits of a suitable substitute
5. a. Respond in a friendly manner
   b. Try to keep the conversation on the subject
6. a. Try to draw the customer out by questioning
   b. Watch customer carefully for any signs of interest
   c. Avoid talking too much
7. a. Disarm customer by not offering the resistance he/she expects
   b. Agree with customer whenever possible

c. Get in selling points by elaborating on those features considered important by the customer

d. Appeal to his/her vanity by asking questions

e. Let the customer do the talking

f. Guard your remarks to keep from anatagonizing the customer

g. Let the customer make his/her decision, without letting him/her think that your help is needed

PRESENTATION
UNIT II

TEST

1. Select from the list below true statements about how to show merchandise. Place an "X" in the correct blanks.

_____a. Handle merchandise respectfully to show that it has value

_____b. Do not use your hands during a presentation

_____c. Show merchandise as it would be used

_____d. Keep your eyes on the merchandise

_____e. Hold the product for the customer as long as possible

_____f. Involve as many of the five senses as possible

_____g. Avoid excesses in all phases of a presentation

2. Select from the following list true statements about what to say about the merchandise during the presentation. Place an "X" in the correct blanks.

_____a. Sell features instead of benefits

_____b. Create pictures in the customer's mind of him/her using the product

_____c. Refer back to statements made by the customer

_____d. Use descriptive words and phrases

_____e. Avoid degrading, annoying, or trite words and phrases

_____f. Use technical words to show the customer you know the product well

_____g. Talk as if you anticipate the customer will buy, not as if you have just a faint hope that he/she might buy

_____h. Ask a series of short questions to which a customer can answer "yes"

_____i. Never argue or sound rude with a customer

_____j. Do not judge a customer by the way he/she is dressed

_____k. Use references of people admired in some way by the customer, such as friends, community leaders, or famous personalities

3. Select from the following list true statements about how to talk about price. Place an "X" in the correct blanks.

   _____a. Generally let the customer mention price first

   _____b. Always support price with a positive statement

   _____c. Generally show the lowest priced merchandise first

   _____d. Show small quantities if no preference is stated

4. Discuss factors affecting how much merchandise to show at one time.

5. Discuss where to focus attention in the following situations when the customer is not alone.

   a. With friends who influence the customer--

   b. Husband and wife together--

   c. Group of people--

   d. Parents with children--

6. Tell how to handle statements about competitors.

7. State one way to recognize and one way to help the following types of customers.

   a. Impulsive customer

      1) How to recognize

      2) How to help

   b. Deliberate customer

      1) How to recognize

2) How to help

c. Undecided customer

1) How to recognize

2) How to help

d. Decided customer

1) How to recognize

2) How to help

e. Very talkative customer

1) How to recognize

2) How to help

f. Silent customer

1) How to recognize

2) How to help

g. Know-it-all customer

1) How to recognize

2) How to help

PRESENTATION
UNIT II

ANSWERS TO TEST

1. a, c, f, g

2. b, c, d, e, g, h, i, j, k

3. a, b

4. Discussion should include:

   a. Generally show no more than three items at one time in most situations

   b. Remove items from the customer's view as she/he indicates a lack of interest

   c. Replace unwanted items with other items in which the customer may be interested

   d. Gradually narrow the selection until a buying decision is made

5. Discussion should include:

   a. Concentrate on the friend and together you will help the customer meet his/her buying needs

   b. Sell to the leader

   c. Concentrate on the leader

   d. Realize that children often influence their parents on what to buy

6. a. Do not criticize competitors or their products

   b. Refer a customer to another store if there is no way to get the product for the customer within a reasonable period of time

7. Answer should include any one of the following under each category:

   a. Impulsive customer

      1) How to recognize

         a) Wants to buy quickly

         b) Doesn't want detailed information

         c) Changes mind frequently

        - 2) How to help
            - a) Give quick service
            - b) Give quick, to-the-point answers
    - b. Deliberate customer
        - 1) How to recognize
            - a) Is slow and careful
            - b) Is a good listener
            - c) Wants merchandise facts and demonstrations
            - d) Likes to see a variety of merchandise for comparison
            - e) May be hard to please
        - 2) How to help
            - a) Show merchandise with information and demonstration
            - b) Show a variety of merchandise and guide the comparisons
            - c) Don't rush decisions
    - c. Undecided customer
        - 1) How to recognize
            - a) Usually knows need but is uncertain on what will satisfy the need
            - b) Needs suggestions
            - c) Needs assurance that right decision is being made
        - 2) How to help
            - a) Don't show too large an assortment
            - b) Show, explain, and demonstrate
            - c) Give honest compliments to build confidence
            - d) Help without forcing a decision
    - d. Decided customer
        - 1) How to recognize
            - a) Tells exactly what he/she wants

        - b) Likes to make the decision by himself/herself
        - c) Likes to do the talking
    - 2) How to help
        - a) Show the merchandise quickly
        - b) Tell customer if merchandise is not available and quickly point out the benefits of a suitable substitute
- e. Very talkative customer
    - 1) How to recognize
        - a) Likes to talk
        - b) Is very friendly
        - c) Wanders off the subject of the product
    - 2) How to help
        - a) Respond in a friendly manner
        - b) Try to keep the conversation on the subject
- f. Silent customer
    - 1) How to recognize
        - a) Is not enthusiastic
        - b) Does not seem to want to make a decision
        - c) May not seem to pay much attention
        - d) May listen but not comment
    - 2) How to help
        - a) Try to draw the customer out by questioning
        - b) Watch customer carefully for any signs of interest
        - c) Avoid talking too much, but do not allow conversation to lag
- g. Know-it-all customer
    - 1) How to recognize
        - a) Discredits all information given
        - b) Is disagreeable

2) How to help

  a) Disarm the customer by not offering the resistance he/she expects

  b) Agree with the customer whenever possible

  c) Get in selling points by elaborating on those features considered important by the customer

  d) Appeal to customer's vanity by asking questions

  e) Let the customer do the talking

  f) Guard your remarks to keep from antagonizing the customer

  g) Let the customer make his/her own decision without letting him/her think that your help is needed

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE

UNIT III

UNIT OBJECTIVE

After completion of this unit, the student should be able to complete the last four steps of the sales process and to put all the steps together in order to make a satisfactory sale. This will be evidenced by matching common objections about merchandise, the time of purchase, and price to methods of handling those objections and selecting from lists true statements about what to do when a sale is not closed and true statements about suggestion selling. The student should also be able to arrange in order the steps in substitute selling, list reasons for offering reassurance, select from a list non-selling duties of salespersons, and tell how to trade-up. This knowledge will be evidenced through demonstration and by scoring eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Select from a list true statements about handling customers' objections.
2. Match methods of handling common objections about merchandise to descriptive statements of each.
3. Match common objections related to time of purchase and price to methods of handling those objections.
4. Select from a list true statements about when to close a sale.
5. Match methods of closing to explanations of each.
6. Select from a list true statements about what to do when a sale is not closed.
7. Select from a list benefits of suggestion selling.
8. Select from a list types of items to suggest.
9. Select from a list rules for suggestion selling.
10. Tell how to trade up.
11. Arrange in order the steps in substitute selling.
12. List the reasons for offering reassurance after the sale has been closed.
13. List common duties of a salesperson other than direct selling.
14. Analyze a sales demonstration.
15. Demonstrate the ability to complete the sales process by conducting a sales demonstration.

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE
UNIT III

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

   A. Give pretest using objective sheet.

   B. Order films.

   C. Invite guest speakers.

   D. Provide student with objective sheet.

   E. Provide student with information and assignment sheets.

   F. Role play a sales demonstration.

   G. Make transparencies.

   H. Discuss unit and specific objectives.

   I. Discuss information and assignment sheets.

   J. Give test.

   K. Reteach if necessary.

   L. Test again until minimum standard is reached.

II. Student:

   A. Read objective sheet.

   B. Study information sheet.

   C. Take notes.

   D. Complete assignment sheets.

   E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

- C. Transparency masters
    - 1. TM 1--Let the Air Out of Objections
    - 2. TM 2--Hidden Features: Find the Silhouettes
    - 3. TM 3--Hidden Features: F[illegible]itch
- D. Assignment sheets
    - 1. Assignment Sheet #1--Overcoming Objections
    - 2. Assignment Sheet #2--Closing the Sale
    - 3. Assignment Sheet #3--Suggestion Selling
    - 4. Assignment Sheet #4--Analyzing a Sales Demonstration
    - 5. Assignment Sheet #5--Conducting a Sales Demonstration
- E. Test
- F. Answers to test

II. References:

- A. Ernest, John W., and Ashmun, Richard D. *Salesmanship Fundamentals.* Dallas, Texas: Gregg Division/McGraw-Hill Book Co., 1973.
- B. Boale, Yvonne G., and Coney, Joseph A. *Retail Selling.* Dallas, Texas: Gregg Division/McGraw-Hill Book Co., 1972.
- C. Richert, G. H., Meyer, Warren G., Haines, Peter G., and Harris, E. Edward. *Retailing Principles and Practices.* 6th ed. Dallas, Texas: Gregg and Community College Division/McGraw-Hill Book Co., 1974.
- D. Madson, John H. *Selling Techniques.* Carson City, Nevada: State of Nevada Department of Education.
- E. *The Sales Process.* East Lansing: Michigan State University, Department of Secondary Education and Curriculum.

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE
UNIT III

INFORMATION SHEET

I. Handling customers' objections

   A. Anticipate objections and try to answer them with adequate product information beforehand

   (NOTE: This is especially effective with new or controversial products.)

   B. Welcome objections as a signal that the customer needs more information

   C. Use objections as clues on how to improve service

   D. Realize that objections are natural and often show that the customer is interested in buying

   E. Realize that the customer may be convinced but needs assurance so that the purchase can be defended later at home or to friends

   F. Realize that objections can be used to improve future sales presentations

   G. Avoid any delay in answering objections

   (NOTE: Delay may cause the answer to appear made up.)

II. Methods of handling objections about the merchandise (Transparency 1)

(NOTE: It is important to recognize the difference between an excuse and a sincere objection. An excuse, such as "I'm just shopping around today," may be hiding a real objection.)

   A. "Yes . . . but" or "Yes . . . and" method--Agreeing with the customer's reasoning before answering the objection

   Example: "Yes, it is a light color, but it is treated to be stain-resistant."

   B. Superior point method--Agreeing that the objection is true and then offering a selling point to offset the objection

Example:	*Customer*:	"I didn't think it would cost that much."
	Salesperson:	"It is not a low-priced chair and here's the reason why (pointing to tag). This brand means top quality. This sturdy chair is covered with easy-to-care vinyl over soft foam rubber. Sit in the chair and feel how comfortable it is. That is why the chair costs more and why it's worth the price."

INFORMATION SHEET

C. Boomerang method--Turn the objection into a selling point

Example:	*Customer:*	"These pans are so light."
	Salesperson:	"That is why these aluminum pans are so remarkable. They're not only light and easy to handle, but they're as thick as the average iron and copper pans which means no scorching of food."

D. Explanation method

1. Used when the salesperson feels the objection is based upon a mistaken belief
2. Salesperson should ask the customer to explain the objection

   (NOTE: Caution must be taken to do so politely and sincerely so the salesperson does not offend the customer.)

Example:	*Customer:*	"I wouldn't have an aluminum pan; it causes food poisoning."
	Salesperson:	"I'd be interested in why you think that, Mrs. Jones."

E. Direct denial method--When the objection is in the form of a question or concerning store policy

Example:	*Customer:*	"Will this material shrink?"
	Salesperson:	"No, it is guaranteed not to shrink."
	Customer:	"I was told I only had to pay one dollar down."
	Salesperson:	"I'm sorry, but our policy requires a twenty-five percent deposit."

F. Demonstration method--Objection is handled through a demonstration and a brief comment

Example:	*Customer:*	"I need sturdier luggage. You know how luggage gets tossed around in airports."
	Salesperson:	"Watch this, Ms. Anderson (stands on luggage), not one dent."

III. Methods of handling common objections related to time of purchase and price (Assignment Sheet #1)

A. "That's more than I want to pay."

1. Discover the price range desired by the customer
2. Justify the price in terms of value

   (NOTE: Your price may actually be lower when quality and service are considered.)

INFORMATION SHEET

B. "I can buy the same thing somewhere else for less."

1. Point out advantages of buying in your store

   Examples: Convenient location, gift wrapping

2. Products which look alike may not be of the same quality

   (NOTE: Comparison shopping done by the salesperson will help the customer and the salesperson know if products are exactly the same or only similar.)

C. "I'll wait until it's marked down."--Point out that the merchandise may soon be gone

D. "I want to look around first."--Repeat and emphasize the important features and benefits to the customer

E. "I want my husband (wife, parents) to see it first."--Explain the convenience of approval, layaway, or credit policy

F. "I don't have enough money right now."--Explain the convenience of approval, layaway, or credit policy

G. "Will you cut the price?"--Explain that you want to be fair to all customers and it would seem unfair to other customers to cut prices for a few favored individuals

H. "I can't afford it."

1. Many products will save the customer money in the long run
2. Customer cannot afford to be without the product
3. Payment terms and trade-ins should be mentioned

I. "I have always bought brand "X."

1. Agree that it is a good brand
2. Point out similar features of that brand and your brand
3. Point out the benefits of your brand

IV. When to close the sale

A. When all basic questions have been answered [illegible] the customer's satisfaction

Examples:
Do I need it?
Should I buy it here?
Will it satisfy my needs better than something else?
Am I willing to pay the price?
Should I buy it now?

INFORMATION SHEET

B. At any point during the sale where the customer gives signals that he/she is ready to buy

(NOTE: Some salespersons are determined to complete their whole presentation even though the customer is ready to buy much earlier. Others are afraid to ask the customer to buy even though the customer expects it.)

1. Verbal buying signals
   a. "Can I charge this?"
   b. "Do you install these?"
   c. "What kind of guarantee does this have?"
   d. "Do you think these go together?"
   e. "Do you charge for alterations?"
2. Action buying signals
   a. Setting one item aside
   b. Reexamining an item
   c. Demonstrating the product by himself/herself
   d. Nodding head in approval
   e. Silence

V. Methods of closing (Assignment Sheet #2)

A. Ask for the sale--Ask a question which calls for the customer to make a decision

Example: **Salesperson**: "Are there any other questions I could answer for you?"
Customer: "No."
Salesperson: "Then shall I charge this to your account? Would you like us to deliver this?"

B. Review the selling points--Summarize the benefits important to the customer and ask if you may wrap it up, put it on layaway, or charge it

C. Last chance--Use a statement that tells the customer he/she should purchase the product while it is still available

Examples: "This is one of our most popular styles. There are not many left."

"Attention shoppers. For the next 15 minutes only, we are offering our lamps at a 25% discount."

INFORMATION SHEET

D. Premium offer--Mention special features held aside for closing

Examples: "Buy today and receive 100 trading stamps."

"We are offering these charcoal drawings with a minimum deposit of ten dollars in your savings account."

E. Closing on the objection--Answer the objection and close at the same time when the salesperson is certain that one objection raised is the only reason for not buying

Example:	*Customer*:	"I love that chest, but I prefer the knob type drawer pulls."
	Salesperson:	"If we could change the drawer pulls, would you take the chest?"
	Customer:	"Yes."
	Salesperson:	"We'll let you select the drawer pulls you like best."

F. Contrasting advantages and/or disadvantages--Weigh the advantages of having the merchandise against the disadvantages of not having the merchandise

Example: "Let's figure together on this sheet of paper exactly how much it will cost if you take the refrigerator with the automatic ice maker." (After figuring cost) "As you can see, Ms. Freeze, for only eight cents a week you can have this added convenience."

G. Trial close--Help a customer make decisions on minor points and if favorable go ahead and try to close the sale

Examples: Customer decides that he wants to buy today, that he wants a particular brand and color, and/or that he wants the merchandise delivered

H. Assuming a close--Begin to fill out the order automatically after the customer has agreed to everything that has been said previously

(NOTE: Be careful not to appear pushy.)

Example: The customer has agreed to several trial closes but hesitates to make a final decision. With the sales ticket in hand, ask the customer where he would like the merchandise delivered.

I. Standing room only--Tell the customer if other people are interested in purchasing a limited item

(NOTE: People have a tendency to want what others want.)

Examples: "Several people are interested in that green sedan we got in last week."

INFORMATION SHEET

"I would like to see you be the first to handle this line of cologne, Mr. Prune. If you can't see your way clear to taking it now, I'm afraid I'll have to offer it to Fanny's Fancy Department Store."

J. Service close--Ask a question or make a statement referring to the services offered with the product

Examples: "We can have your dishwasher installed on Friday. Is Friday alright with you?"

"Mr. Jones, we can have these pants altered for you by tomorrow afternoon, or do you need them sooner?"

"We can deliver this range at three o'clock this afternoon, and you can be enjoying the benefits of the self-cleaning oven this weekend."

K. Offer a choice--Narrow the selection to a few items and ask the customer to decide between the items

(NOTE: It is easier to make a decision between two items than between something and nothing.)

Example: "Which do you prefer, Mrs. Rich, the gold or silver?"

L. That's all there is--Simply state that all your merchandise has been shown

Example: "That's all the styles we have at this time."

M. Summarizing objections--Summarize the customer's objections, asking if he/she is ready to buy if all objections are met; then show the merchandise that will answer the objections and close the sale at the same time

Example: "Let me see if I understand you correctly, Mr. Snodgrass. If we have a lawn mower with an electric starter and a grass catcher that attaches on the side of the mower, it would solve your problem. Right? Well, Mr. Snodgrass, we have a mower right over here which may just be the answer."

VI. When a sale is not closed

A. Thank the customer

B. Invite him/her to look around

(NOTE: This is a good time to suggest that the customer look at special bargains.)

C. Invite the customer to return again

D. Realize that the customer may have just wanted ideas or information which will result in sales at a future date

INFORMATION SHEET

VII. Benefits of suggestion selling

A. Allows customer to have all the items to meet his/her needs

Example: Batteries for toys and flashlights

B. Is preferred by the majority of customers

(NOTE: This statement is based upon a survey of 2,000 customers.)

C. Reminds customers of things they need/want but may have forgotten

D. Increases profit and sales

Examples:

1 pair of socks at $1.50	$1.50
Cost (60% of selling price)	.90
Store's gross profit	$ .60
Operating expenses	.52
Net profit	$ .08
2 pairs of socks at $1.50	$3.00
Cost (60% of selling price)	1.80
Store's gross profit	$1.20
Operating expenses	.56
Net profit	$ .64

(NOTE: In the above example there is eight times more profit from selling twice as much merchandise.)

VIII. Types of items to suggest

(NOTE: You haven't offered full service until you have suggested merchandise that may please your customers.)

A. Related items

Examples: "Would you like to take three pairs of these nylons? You can buy the same shade in all three pairs and stretch the life of your stockings by matching up single stockings when one pair gets a run."

"Do you need tennis balls to go with your racket?"

"We have chocolate and cherry pie. The cherry is very good with ice cream."

"This cleaning fluid is recommended by the manufacturer for cleaning the kind of type face on the typewriter you have just purchased."

INFORMATION SHEET

"Shall I check your oil?"

"It looks like you'll soon be needing a new fan belt."

"This is the matching nail polish for your lipstick."

"Do you like to take pictures indoors? If so, you'll need some of these flashcubes."

B. Larger quantities

Example: "These scarves are $1.00 each or 3 for $2.50, a saving of 50 cents."

C. New merchandise

Example: "We have an interesting new item in these attractive place mats, a real labor saver."

D. Special bargains

Example: "Here is a comfortable house shoe that has just been reduced."

E. Advertised products

Example: "This is the blouse advertised today, a dacron blouse on special for $5.00."

F. Items appropriate for the weather

Examples: Galoshes, umbrellas, sunglasses

G. Additional features and new uses for products (Transparencies 2 and 3)

Example: "Mrs. Featherbean told me that she uses the smaller wastebaskets for planters."

H. Items for special occasions and seasons

Example: "Mrs. Bunny, with a handbag and matching shoes you'd have a stunning Easter outfit."

I. Low priced, necessity, and impulse items

J. High priced items with strong emotional appeal

INFORMATION SHEET

IX. Rules for suggestion selling (Assignment Sheet #3)

A. Satisfy the customer's original request before making suggestions and before the original package is wrapped or paid for

(NOTE: If the customer does not have a request, suggestion selling may occur earlier in the selling process.)

B. Consider the customer's wants and needs

C. Be specific

Example: Do not say, "Would you be interested in any ties?" Instead say, "This blue tie would go well with your new shirt."

D. Remain positive

Example: Do not say, "Is there anything else?" but "We have some drapes that match the bedspread you just purchased."

E. Explain the reason for the suggestion

Example: "Do you know how to protect that shine? This leather cleaner will help keep your shoes looking new longer."

F. Show and demonstrate the product while making the suggestion

G. Avoid "throwing" too many different items at the customer

(NOTE: He/she will get tired and irritated at having to say "no.")

X. Trading up

(NOTE: Trading up is suggesting higher quality merchandise. Trade up only if the additional quality may benefit the customer. Do not trade up merely to increase the amount of the sale. Trading up is not the same as unethical bait and switch practices where a store may advertise inexpensive merchandise, tell the customer it is all gone, and try to sell more expensive merchandise.)

A. Place two items side by side

B. Point out the additional benefits and features of the better product without belittling the lower-priced merchandise

XI. Steps in substitute selling

(NOTE: This is used when the item asked for is not available.)

A. Show substitute item quickly

(NOTE: Do not use the word "substitute.")

INFORMATION SHEET

B. Point out the similarities of the item asked for and those of the substitute product

C. Point out any additional benefits of the product substituted

(NOTE: Do not press a decision if the customer is not interested in any other product.)

XII. Reasons for offering reassurance after the sale has been closed

(NOTE: This is often done while merchandise is being wrapped or as the customer leaves.)

A. Builds goodwill for the store

B. Helps customer feel confident that the selection was a good one

(NOTE: Customers often wonder if they did the right thing after making an expensive purchase.)

Example: "Thank you, Mrs. Lemon. I know your husband will be happy with those gloves. We'll be happy to refund your money or exchange them if he doesn't like them for some reason. Come see us again."

C. Shows that the salesperson is sincerely interested in helping the customer

(NOTE: To not say anything after the customer has agreed to buy may make the salesperson appear rude or abrupt to the customer.)

XIII. Common duties of a salesperson other than direct selling

A. Keeping records

B. Keeping stock ready to sell

Examples: Priced, displayed, coordinated with advertisements and promotions

C. Doing housekeeping duties

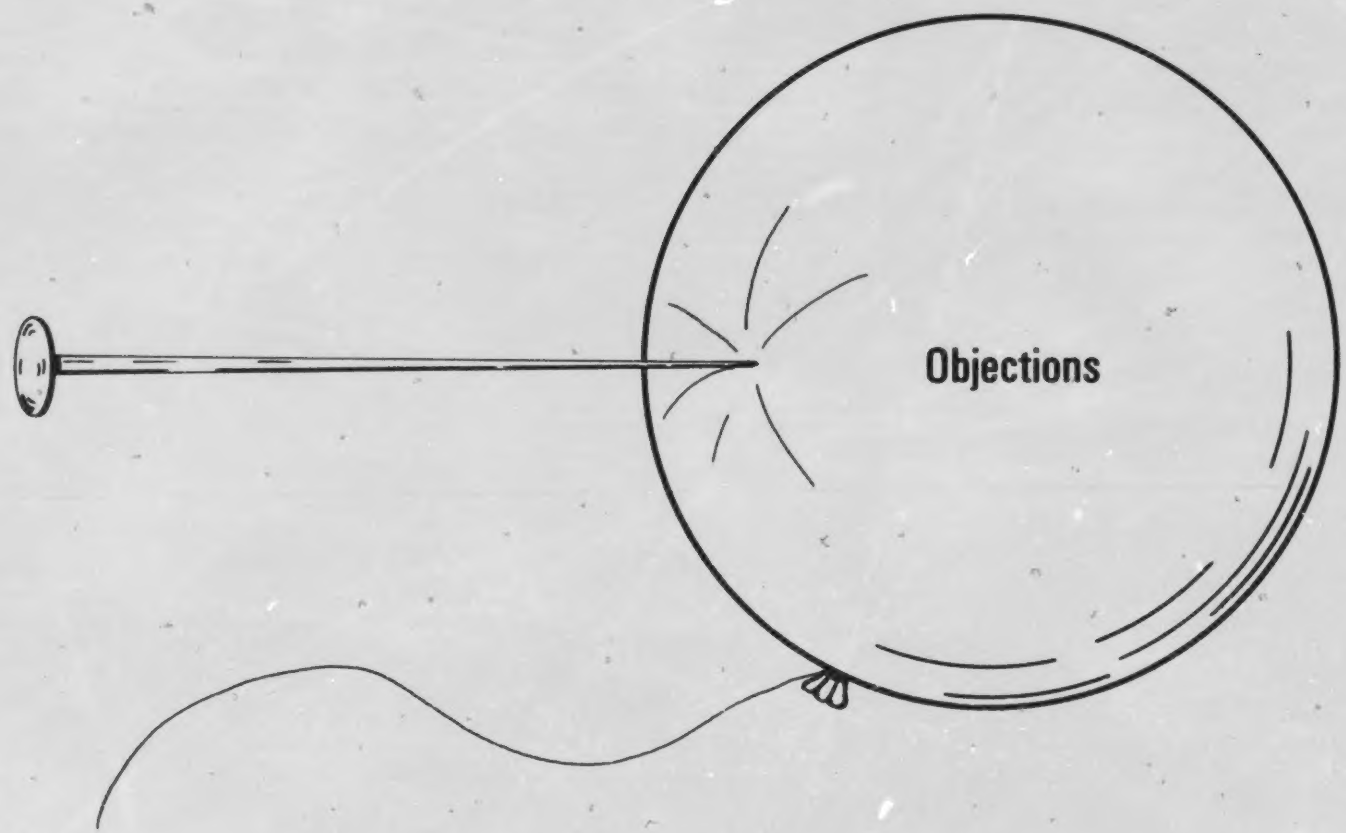
D. Handling returns and refunds

E. Wrapping merchandise

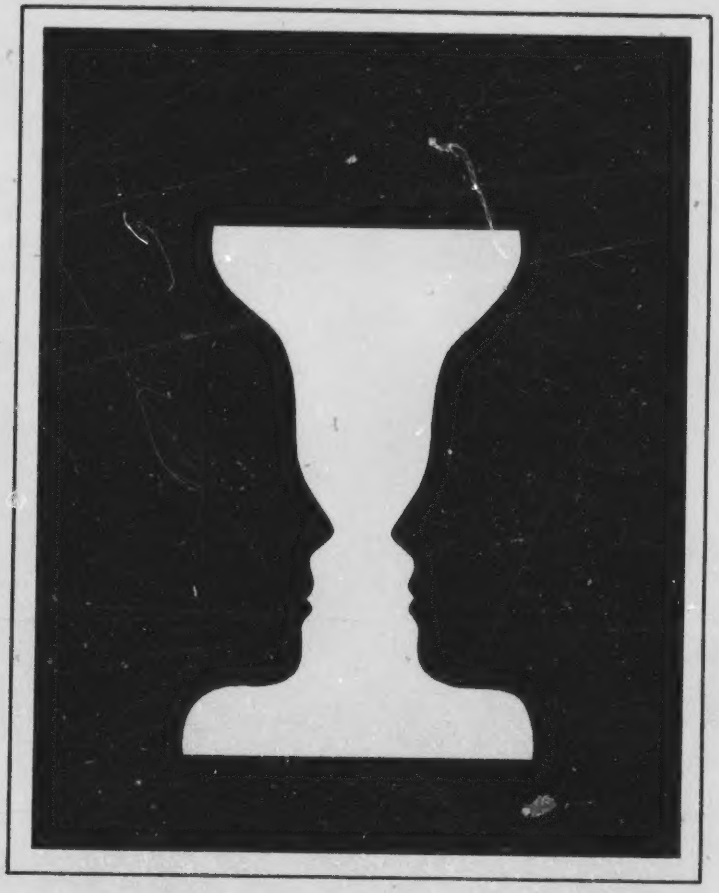
F. Attending store meetings

G. Learning about merchandise

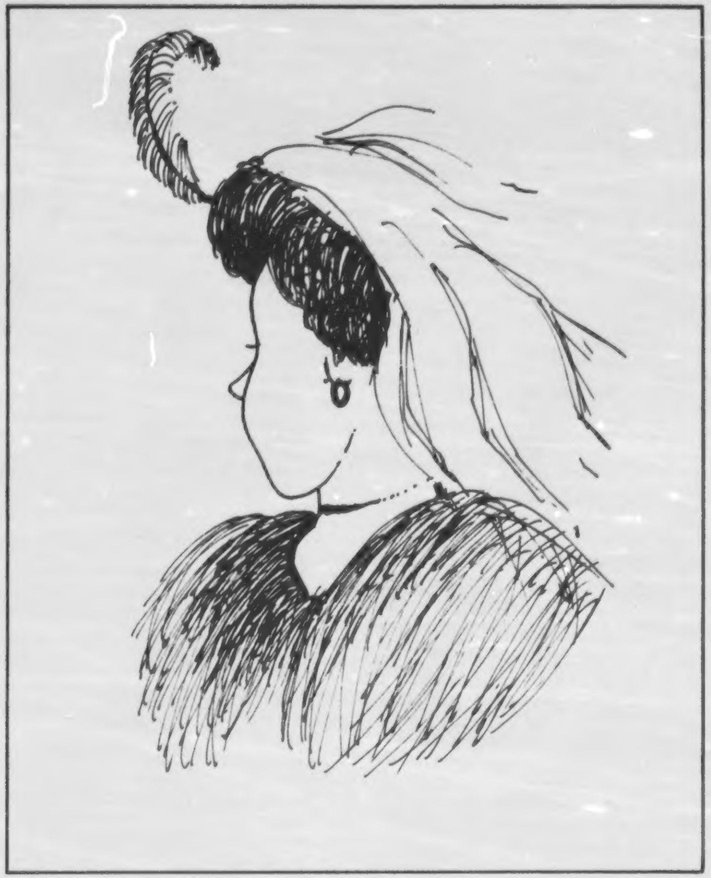
Let the Air Out of Objections


Objections

Hidden Features : Find the Silhouettes



Hidden Features : Find the Witch



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OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE
UNIT III

ASSIGNMENT SHEET #1--OVERCOMING OBJECTIONS

1. Below is a list of objections. Tell how you would answer each of the objections.

   a. The price is too high.

   b. I must consult my husband first.

   c. I'm in a hurry now, but I will be back later.

   d. I want to shop around a little.

   e. I think I can do better somewhere else.

   f. I left my pocketbook at home.

   g. If I bought this, I could never balance my budget.

   h. I'm too tired to know what I want.

   i. I am afraid this hunting coat will not resist water.

   j. This coat is too lightweight to be of any value on a cold day.

   k. This bicycle doesn't seem to have good coaster brakes.

   l. This wagon is not built strong enough for my rugged boys.

   m. Everybody in town will have a dress just like it.

   n. I can buy the same article cheaper across the street.

ASSIGNMENT SHEET #1

o. Will you cut the price?

p. I won't have anything to do with your company; they gave me a bad deal last year.

q. That calculator is expensive!

r. I'm afraid these colors will run and fade.

s. Color televisions give off harmful radiation.

t. I don't see how these blankets could be very warm. They're not very heavy.

2. List at least five objections to products you sell and give an answer for each objection.

a.

b.

c.

d.

e.

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE
UNIT III

ASSIGNMENT SHEET #2--CLOSING THE SALE

1. Write closing statements using the methods listed for each product.

   a. Product: Stainless steel flatware
      Method: Ask for the sale

   b. Product: Gas range
      Method: Last chance

   c. Service: Dry cleaning
      Method: Premium offer

   d. Product: Electric hand mixer
      Method: Closing on the objection

   e. Product: Car
      Method: Contrasting advantages and/or disadvantages

   f. Product: Dining room furniture
      Method: Assuming a close

   g. Product: Garden tractor with snow plow attachment
      Method: Standing room only

   h. Product: Custom draperies
      Method: Action close

ASSIGNMENT SHEET #2

i. Product: Piano
   Method: Trial closes

j. Product: Art supplies
   Method: Offer a choice

k. Product: Styles of calling cards that may be printed
   Method: That's all there is

l. Product: Eye glasses cleaner
   Method: Review the selling points

m. Product: Man's suit
   Method: Summarizing objections

2. Select at least five products or services you sell or would like to sell and write closing statements for each of them.

   a.

   b.

   c.

ASSIGNMENT SHEET #3

h. Spring promotion for Easter, Mother's Day, and graduation presents

i. Valentine's Day approaching

j. Picnic and B-B-Q supplies on display

k. Film displayed near cash register

l. Milk on sale

3. Select at least five products or services which you sell or would like to sell and write suggestion selling statements for each of them.

a.

b.

c.

d.

e.

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE
UNIT III

ASSIGNMENT SHEET #3--SUGGESTION SELLING

1. List related items for each of the following products.
   a. Lipstick
   b. Garden seed
   c. Shoes
   d. Camera
   e. Hamburger
   f. Gasoline
   g. Piece goods
   h. House paint
   i. Suit
   j. Suede coat
2. Write suggestion selling statements for the following situations.
   a. Detergent that is less expensive in the giant size box
   b. Socks which are less expensive if bought two pair at a time
   c. Swimming suits advertised in the newspaper and displayed for the summer sale
   d. Candles which just arrived
   e. Children's games which are reduced 25%
   f. Fad to make candy dishes from colorful ashtrays
   g. Christmas decorations on display

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE

UNIT III

ASSIGNMENT SHEET #4--ANALYZING A SALES DEMONSTRATION

Read the following sales demonstration and answer the questions after the dialogue.

A woman enters the shoe department of a retail store and looks at a display of shoes. The salesperson walks toward her.

Salesperson: May I help you?
Customer: Well, maybe. I'm looking for shoes that I can wear with pants
Salesperson: All the shoes to go with pants are on that table (points to table).
Customer: Are those all the colors you have?
Salesperson: Yes.
Customer: Oh, here are some shoes in off-white. Do you have these shoes in my size?
Salesperson: What size do you wear?
Customer: I don't know. It might be a 6½B or 7B. I'm not sure.
Salesperson: OK. Let's try 6½B.
(The salesperson goes to the stockroom and comes back with a box. He opens the box and places it on the customer's lap.)
Salesperson: Why don't you try these on? I'll be right back.
Customer: Thank you.
(After a while, the salesperson returns.)
Salesperson: Are they all right?
Customer: I think so, but they feel a little bit tight.
Salesperson: I'll stretch them for you.
Customer: That might help.
Salesperson: Will that be cash or charge?
Customer: No. I'm still not sure. I do like the shoes, but I think I'll look around.
Salesperson: OK.

1. What particular things were wrong with this sales demonstration?

2. What could the salesperson have said and done to make his sales demonstration more effective?

3. Rewrite the presentation and dialogue as you would go through the sales process. You may use the back of this assignment sheet.

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE
UNIT III

ASSIGNMENT SHEET #5--CONDUCTING A SALES DEMONSTRATION

1. Answer the following questions:

   a. How can a knowledge of the sales process help a person interviewing for a job?

   b. How can a knowledge of the sales process be helpful to people in jobs other than those found in distribution, such as 1) auto mechanics, 2) hospital administration, 3) architecture, 4) politics, 5) law, 6) theology, 7) engineering, and 8) education?

      1) Auto mechanics

      2) Hospital administration

      3) Architecture

      4) Politics

      5) Law

      6) Theology

      7) Engineering

      8) Education

ASSIGNMENT SHEET #5

c. How does the study of human relations, communications, body language, and making introductions help a person be a better salesperson?

2. Perform a sales demonstration using descriptive words and adequate product knowledge. Have your classmates rate your sales demonstration using the rating sheet for the DECA sales demonstration competitive activity on the following page.

(NOTE: Excellent examples of product descriptions may be found in catalogs.)

ASSIGNMENT SHEET #5

SALES DEMONSTRATION

Rating Sheet

* * *

RATING SCALE
Superior 80-100
Excellent 60-79
Good 40-59

Student Salesman Number ______________________

Type of Merchandise Sold ______________________

	Poor	Fair	Good	Excellent	Judged Points
APPROACH: (Possible Points--10) 1. Alertness (2 pts.) 2. Sincerity (2 pts.) 3. Approached the customer correctly for the selling situation (2 pts.) 4. Used an appropriate greeting (2 pts.) 5. Appearance (2 pts.)	0-1-2	3-4-5	6-7-8	9-10	_____
PRESENTATION: (Possible Points--25) 1. Was presentation clear? (5 pts.) 2. Were benefits shown? (5 pts.) 3. Was customer given an opportunity to talk and ask questions? (5 pts.) 4. Was sufficient merchandise information given? (5 pts.) 5. Was presentation too rapid or too slow? (5 pts.)	0-7	8-14	15-22	23-25	_____
HANDLING OBJECTIONS: (Possible Points--15) 1. Was each objection answered? (5 pts.) 2. Was tact used in handling objections? (5 pts.) 3. Was customer given an opportunity to voice objections? (5 pts.)	2-3-4	6-7-8	10-11-12	13-14-15	_____
VOICE: (Possible Points--15) 1. Was volume too loud or too soft? (5 pts.) 2. Was voice clear? (5 pts.) 3. Was tone varied or monotonous? (5 pts.)	2-3-4	6-7-8	10-11-12	13-14-15	_____
CLOSE: (Possible Points--20) 1. Was close smooth and natural? (10 pts.) 2. Did contestant take advantage of opportunities to close? (10 pts.)	1-3-5	6-8-10	11-13-15	16-18-20	_____
SUGGESTION SELLING: (Possible Points--15) 1. Was this a smooth and natural part of the sale? (5 pts.) 2. Did contestant select a properly related item to suggest? (5 pts.) 3. Was the timing proper for the suggestions of a related item? (5 pts.)	2-3-4	6-7-8	10-11-12	13-14-15	_____
TOTAL POSSIBLE POINTS 100		TOTAL JUDGED POINTS			_____

______________________ Judge's Name

______________________ Business Address

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE
UNIT III

TEST

1. Select from the following list true statements about handling customer's objections. Place an "X" in the correct blanks.

_____a. Anticipate objections and try to answer them with adequate product information beforehand

_____b. Objections mean the customer is not interested in buying

_____c. Welcome objections as a signal that the customer needs more information

_____d. Use objections as clues on how to improve service

_____e. Realize that the customer may be convinced but needs assurance so that the purchase can be defended later at home or to friends

_____f. Avoid any delay in answering objections

2. Match the methods of handling objections about merchandise on the right to descriptive statements on the left. Place the numbers in the correct blanks.

_____a. Agreeing with the customer's reasoning before answering the objection

_____b. Objection is handled through a demonstration and a brief comment

_____c. When the objection is in the form of a question or concerning store policy

_____d. Used when the salesperson feels the objection is based upon a mistaken belief; salesperson should ask the customer to explain the objection

_____e. Turn the objection into a selling point

_____f. Agreeing that the objection is true and then offering a selling point to offset the objection

1. "Yes . . . but" or "Yes . . . and" method
2. Superior point method
3. Boomerang method
4. Explanation method
5. Direct denial method
6. Demonstration method

3. Match common objections related to time of purchase and price on the right to methods of handling those objections on the left. Place the correct numbers in the blanks. A blank may have more than one answer.

______a. Discover the price range desired by the customer; justify the price in terms of value

______b. Agree that it is a good brand, point out similar features of that brand and your brand, and then point out the benefits of your brand

______c. Explain the convenience of approval, layaway, or credit policy

______d. Point out the advantages of buying in your store; products which look alike may not be of the same quality

______e. Point out that the merchandise may soon be gone

______f. Many products will save the customer money in the long run; customer cannot afford to be without the product; payment terms and trade-ins should be mentioned

______g. Repeat and emphasize the important features and benefits to the customer

______h. Explain that you want to be fair to all customers and it would seem unfair to other customers to cut prices for a few favored individuals

1. "That's more than I want to pay."
2. "I can buy the same thing somewhere else for less."
3. "I'll wait until it's marked down."
4. "I want to look around first."
5. "I want my husband (wife, parents) to see it first."
6. "I don't have enough money right now."
7. "Will you cut the price?"
8. "I can't afford it."
9. "I have always bought brand "X."

4. Select from the following list true statements about when to close a sale. Place an "X" in the correct blanks.

______a. Close when all basic questions have been answered to the customer's satisfaction

______b. Close at any point during the sale where the customer gives signals that he/she is ready to buy

______c. Buying signals may be verbal but not shown through actions

5. Match methods of closing on the right to explanations of each on the left by placing the numbers in the correct blanks.

______a. Summarize the benefits important to the customer and ask if you may wrap it up, put it on layaway, or charge it

______b. Ask a question which calls for the customer to make a decision

______c. Weigh the advantages of having the merchandise against the disadvantages of not having the merchandise

______d. Mention special features held aside for closing

______e. Answer the objection and close at the same time when the salesperson is certain that one objection raised is the only reason for not buying

______f. Use a statement that tells the customer he/she should purchase the product while it is still available

______g. Simply state that all your merchandise has been shown

______h. Narrow the selection to a few items and ask the customer to decide between the items

______i. Tell the customer if other people are interested in purchasing a limited item

______j. Ask a question or make a statement referring to the services offered with the product

______k. Begin to fill out the order automatically after the customer has agreed to everything that has been said previously

______l. Help a customer make decisions on minor points and if favorable go ahead and try to close the sale

______m. Summarize the customer's objections, asking if he/she is ready to buy if all objections are met; then show the merchandise that will answer the objections and close the sale at the same time

1. Ask for the sale
2. Review the selling points
3. Last chance
4. Premium offer
5. Closing on the objection
6. Contrasting advantages and/or disadvantages
7. Trial close
8. Assuming a close
9. Standing room only
10. Service close
11. Offer a choice
12. That's all there is
13. Summarizing objections

6. Select from the following list true statements about what to do when a sale is not closed. Place an "X" in the correct blanks.

_____a. Do not do anything

_____b. There is nothing to say "thank you" about

_____c. Invite him/her to look around

_____d. Invite the customer to return again

_____e. Realize that the customer may have just wanted ideas or information which will result in sales at a future date

7. Select from the following list benefits of suggestion selling. Place an "X" in the correct blanks.

_____a. Most customers don't like suggestion selling but it's a way to increase your sales

_____b. Customer buys a lot of things which he/she doesn't need or want and, thus, increases sales

_____c. Reminds customers of things they need/want but may have forgotten

_____d. Increases profit and sales

8. Select from the following list types of items to suggest by placing an "X" in the correct blanks.

_____a. Related items

_____b. Larger quantities

_____c. New merchandise

_____d. Special bargains

_____e. Advertised products

_____f. Items appropriate for the weather

_____g. Additional features and new uses for products

_____h. Items for special occasions and seasons

_____i. Low priced, necessity, and impulse items

_____j. High priced items with strong emotional appeal

9. Select from the following list rules for suggestion selling by placing an "X" in the correct blanks.

   ______a. Satisfy the customer's original request before making suggestions and before the original package is wrapped or paid for

   ______b. Consider the customer's wants and needs

   ______c. Be specific

   ______d. Remain positive

   ______e. Explain the reason for the suggestion

   ______f. Show and demonstrate the product while making the suggestion

   ______g. Avoid "throwing" too many different items at the customer

10. Tell how to trade up.

11. Arrange in order the steps in substitute selling. Place a "1" in front of the first step, a "2" in front of the second step, and so on.

   ______a. Point out any additional benefits of the product substituted

   ______b. Point out the similarities of the item asked for and those of the substitute product

   ______c. Show substitute item quickly

12. List two reasons for offering reassurance after the sale has been closed.

   a.

   b.

13. List two common duties of a salesperson other than direct selling.

   a.

   b.

14. Analyze a sales demonstration.

15. Demonstrate the ability to complete the sales process by conducting a sales demonstration.

(NOTE: If activities 14 and 15 have not been accomplished prior to the test, ask your DE teacher-coordinator when they should be completed.)

OVERCOMING OBJECTIONS, CLOSE, SUGGESTION SELLING, AND REASSURANCE
UNIT III

ANSWERS TO TEST

1. a, c, d, e, f
2. a. 1
   b. 6
   c. 5
   d. 4
   e. 3
   f. 2
3. a. 1
   b. 9
   c. 5, 6
   d. 2
   e. 3
   f. 8
   g. 4
   h. 7
4. a, b
5. a. 2
   b. 1
   c. 6
   d. 4
   e. 5
   f. 3
   g. 12
   h. 11
   i. 9
   j. 10
   k. 8
   l. 7
   m. 13
6. c, d, e
7. c, d
8. a, b, c, d, e, f, g, h, i, j
9. a, b, c, d, e, f, g
10. a. Place two items side by side
    b. Point out the additional benefits and features of the better product without belittling the lower-priced merchandise

11. a. 3

    b. 2

    c. 1

12. Any two of the following:

    a. Builds goodwill for the store

    b. Helps customer feel confident that the selection was a good one

    c. Shows that the salesperson is sincerely interested in helping the customer

13. Any two of the following:

    a. Keeping records

    b. Keeping stock ready to sell

    c. Doing housekeeping duties

    d. Handling returns and refunds

    e. Wrapping merchandise

    f. Attending store meetings

    g. Learning about merchandise

14. Evaluated to the satisfaction of the teacher-coordinator

15. Performance skill evaluated to the satisfaction of the teacher coordinator

DISPLAY
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to build a display. This will be accomplished in part by arranging in order the steps in creating a display; matching design principles to descriptions; and matching structural design and time classifications to descriptions. The student should also be able to select from lists the purposes of displays, uses of color, lighting techniques, ways to handle customer's requests for displayed merchandise, the placement of interior displays, and factors in planning show card layouts. He/she should be able to identify basic display arrangements, parts of a show card, and types of displays made from stacking boxes. The student should demonstrate the ability to dress a mannequin and make a tray-cut case. This knowledge will be evidenced through demonstration and by scoring eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with display to the correct definitions.
2. Select from a list the purposes of displays.
3. Match time and structural design classifications to descriptions of each.
4. Arrange in order the steps in creating a display.
5. Match basic design principles to descriptions of each.
6. Identify basic display arrangements.
7. Describe the impression given by the number of items in a display.
8. Select from a list true statements about the uses of color in displays.
9. Select from a list true statements about lighting techniques.
10. Select from a list true statements about handling customer's request for merchandise on display.
11. Select from a list true statements about the placement of interior displays.
12. Identify the types of displays made from stacking boxes.
13. Identify the parts of a show card.

14 List purposes of signs or show cards.

15. Select from a list factors to be considered in planning show card layouts.
16. Demonstrate the ability to:
    - a. Dress a mannequin.
    - b. Make a tray-cut case.

DISPLAY
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

A. Give pretest using objective sheet.

B. Make transparencies.

C. Provide student with objective sheet.

D. Provide student with information and assignment sheets.

E. Obtain mannequin and clothes for use with Job Sheet #1.

F. Obtain a color wheel for the class.

G. Provide magazines for students to find examples of the various classifications, arrangements, and design principles discussed in this unit.

H. Provide catalogs for students to cut out pictures and to place the pictures in the various arrangements discussed in this unit.

I. Provide catalogs from display fixture companies to illustrate the cost of display props.

J. Assign students the task of making props, such as wrapping boxes, drawing backgrounds, building shadow boxes, building trellises, and cutting window-cut cases or tray-cut cases.

K. Have students build at least one display by providing them with a theme, props, and ideas or by leaving the total planning of the display to the students. Make arrangements to account for displayed merchandise, props, and dealers' helps.

(NOTE: Displays built in local stores add realism to this activity.)

L. Provide students with DECA display rating sheets to judge each other's displays and/or the displays built by professional people in local stores.

M. Take photographs of students' displays.

N. Take a field trip to the display department of a local store.

O. Invite guest speakers from local display personnel.

- P. Discuss unit and specific objectives.
- Q. Discuss information and assignment sheets.
- R. Demonstrate and discuss procedures outlined in the job sheets.

  (NOTE: Have student use job sheet most appropriate for his/her training station.)
- S. Give test.
- T. Reteach if necessary.
- U. Test again until minimum standard is reached.

II. Student:

- A. Read objective sheet.
- B. Read information sheet.
- C. Take notes.
- D. Complete assignment sheets.
- E. Demonstrate the ability to accomplish the procedures outlined in the job sheets.
- F. Participate in class activities.
- G. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

- A. Objective sheet
- B. Information sheet
- C. Transparency masters
  1. TM 1--Promotional Display
  2. TM 2--Institutional Display
  3. TM 3--Basic Display Stands and Easels
  4. TM 4--Open Display
  5. TM 5--Closed Display

6. TM 6--Point-of-Purchase Display
7. TM 7--Suspension Display
8. TM 8--Color Wheel
9. TM 9--Formal Balance
10. TM 10--Informal Balance
11. TM 11--Shadow Box Display
12. TM 12--Shadow Box: An Easy Prop to Make
13. TM 13--Ledge Display
14. TM 14--Wall Display
15. TM 15--How to Construct a Display
16. TM 16--Workshop Scene
17. TM 17--Removing Old Display
18. TM 18--Display Area
19. TM 19--Cleaning the Display Area
20. TM 20--Collecting Merchandise for Display
21. TM 21--Background
22. TM 22--Props
23. TM 23--Props (Continued)
24. TM 24--Merchandise
25. TM 25--Placing Show Cards in the Display
26. TM 26--Evaluation
27. TM 27--Harmony
28. TM 28--Repetition
29. TM 29--Rhythm
30. TM 30--Contrast
31. TM 31--Gradation-Interference
32. TM 32--Basic Letter Styles

D. Assignment sheets

1. Assignment Sheet #1--Theme Ideas
2. Assignment Sheet #2--Prop Survey
3. Assignment Sheet #3--Lettering Lines
4. Assignment Sheet #4--Lettering Alphabet
5. Assignment Sheet #5--Thumbnail Sketch of a Show Card

E. Job sheets

1. Job Sheet #1--Dress a Mannequin
2. Job Sheet #2--Make a Tray-Cut Case

F. Test

G. Answers to test

II. References:

A. Richert, Henry G.; Meyer, Warren G.; Haines, Peter G.; and Harris, Edward G. *Retailing Principles and Practices.* 6th ed. Dallas: Gregg Division/McGraw Hill Co., 1974.

B. Samson, Harland E. *Advertising and Displaying Merchandise.* Dallas: South-Western Publishing Co., 1967.

DISPLAY
UNIT I

INFORMATION SHEET

I. Terms and definitions

A. Visual merchandising--Impersonal selling through display

B. Promotional display--Display which attempts mainly to sell specific merchandise (Transparency 1)

C. Institutional display--Display used primarily to build customer goodwill (Transparency 2)

Examples: Displays for the Red Cross, county fair, or DECA week

D. Prop--Fixture used to build a display (Transparency 3)

(NOTE: Fixtures may hold merchandise, be used for decoration, raise merchandise to eye level, separate merchandise, or conceal lighting.)

E. Open display--Display used to show merchandise so that the customer may touch it (Transparency 4)

(NOTE: This is particularly important for self-service stores.)

F. Closed display--Display where the merchandise is protected from handling, dust, danger, or theft (Transparency 5)

Examples: White items, hunting knives, expensive jewelry

G. Point-of-purchase display (P-O-P)--Display used to show merchandise near related items, at the ends of aisles, and near the check-out counter (Transparency 6)

(NOTE: These displays are sometimes supplied by the manufacturers to be used specifically for their brand of merchandise. Some suppliers will even assemble the display for the retailer.)

H. Free form display--Display in which color and design take preference over realism

I. Suspension display--Display in which merchandise is hung in mid-air by thin wire or string (Transparency 7)

J. Color wheel--Colors of the spectrum arranged in a circle and used to plan combinations of colors (Transparency 8)

INFORMATION SHEET

K. Advancing colors--Colors that may appear to come forward or make objects look larger

Example: Bright colors, such as reds and oranges

L. Receding colors--Colors that create the illusion of space by making objects look smaller or farther away

Example: Dark colors usually look smaller

M. Focal point--Spot within a rectangle where the eye naturally pauses

N. Optical center--Point a little above the actual measured center

(NOTE: The height and shape of display areas may cause the optical center to be different from the actual center.)

O. Formal balance--Elements spaced evenly on both sides of a display (Transparency 9)

P. Informal balance--Elements of a display not spaced the same on both sides but which appear balanced by varying the distance of larger, heavier elements, various shapes, and colors (Transparency 10)

Q. Dominance--Emphasis given to an idea or item of merchandise to attract the customer's attention

R. Show cards--Signs used in displays to give information about the featured merchandise

S. Copy--Words and printed material on a show card

T. Layout--Arrangements of letters and numbers on a show card

U. Thumbnail sketches--Small, quick sketches that give an idea of how the finished display or show card will look

(NOTE: Usually several sketches are done and the best one is selected.)

II. Purposes of displays

A. To sell merchandise and ideas

B. To bring customers into the store

(NOTE: A window display only has a few seconds to catch the attention of persons passing the store.)

INFORMATION SHEET

C. To build an image of a prestige store or a bargain store

D. To maintain goodwill

E. To suggest combinations of merchandise

F. To introduce new items and uses for products

G. To create a pleasing shopping environment

H. To remind customers of items they may have forgotten or desired after exposure to advertising messages

(NOTE: It is important that displays, advertisements, and the personal selling message all tie together.)

III. Classifications of displays

A. According to the time the display is built

1. Special event display--Display that shows gifts for special occasions, such as holidays

2. Preseason display--Display that shows seasonal merchandise before the season begins

Example: Winter coats shown in August

3. Runner display--Display that shows best selling items

(NOTE: It is best not to display slow moving items in the window. Display the most popular items to draw the customers into the store.)

4. End-of-season display--Display that shows bargains in items that can be used the remainder of the season

B. According to the structural design of the display

1. Shadow box display--Display area resembling a shallow box open on one side (Transparencies 11 and 12)

(NOTE: The shadow box may be used inside the store, on the exterior of the store, or as part of a window display. It is sometimes called a diorama when a curved background is used.)

2. Island display--Display area set off from the rest of the store

INFORMATION SHEET

3. Lobby window display--Windows that are angled toward the store entrance and tend to lead customers into the store

   (NOTE: Products appealing mainly to men are usually displayed in the right lobby windows since the traffic generally looks to the right first and since men usually spend less time window shopping.)

4. Corner window display--Window which may be viewed from several directions

   Example: "L" shaped windows

   (NOTE: Windows may be at different heights or of different shapes. This creates a challenge for the display person to present the merchandise at eye level, avoid vacant gaps, and still maintain balance. The windows may have full, partial, or open backgrounds.)

5. Ledge display--Display above shelves and racks which gives the store a total look (Transparency 13)

6. Wall display--Items attached to interior walls (Transparency 14)

IV. Steps in creating a display

A. Plan the window (Transparencies 15 and 16, Assignment Sheet #1)

(NOTE: This includes selecting a central theme and drawing thumbnail sketches of the display and show cards. The head display person for a business may need to have a general idea of themes and special props needed as much as a year in advance for budget purposes. He/she would then draw more specific plans as the time nears to build the actual display. Ideas for themes and props may be found in display magazines such as *Visual Merchandising,* fashion magazines such as *Seventeen,* and various trade journals.)

B. Remove merchandise and fixtures from old display (Transparencies 17 and 18)

C. Clean the display area (Transparency 19)

(NOTE: Wash window, vacuum floor, dust props, and remove old adhesive tape from signs.)

D. Select the merchandise and props (Transparency 20, Assignment Sheet #2)

INFORMATION SHEET

E. Set up large props (Transparencies 21, 22, and 23)

Examples: Panels, mannequins, special backgrounds

(NOTE: If mannequins are used, decorate them in the window or display area.)

F. Place the merchandise and accessories in the display (Transparency 24)

G. Add decorative props (Transparency 24)

Examples: Spring flowers, fall leaves

H. Place show cards (Transparency 25)

I. Place prices on merchandise (Transparency 25)

(NOTE: The use of prices in displays varies with store policy.)

J. Make necessary adjustments (Transparency 26)

(NOTE: Stand back and look at the display from all angles. View the display as the customer would.)

V. Basic design principles

(NOTE: The following principles of design may apply to the shapes, lines, direction, sizes, textures, weights, or colors of merchandise and accessories. More than one design principle may be used in a display.)

A. Harmony--Combining items to create a unified effect (Transparency 27)

Examples: Area of only various shades and tints of pink
Display of basically round objects

B. Repetition--Arranging similar items at the same angle and with the same distance between each item (Transparency 28)

C. Rhythm--Repeating features at regular intervals or patterns (Transparency 29)

Examples: Every third item in the display may be red
Not placing two food items of the basic same color next to each other on a plate

D. Contrast--Combining opposites (Transparency 30)

Example: Placing white bone china against a black burlap background

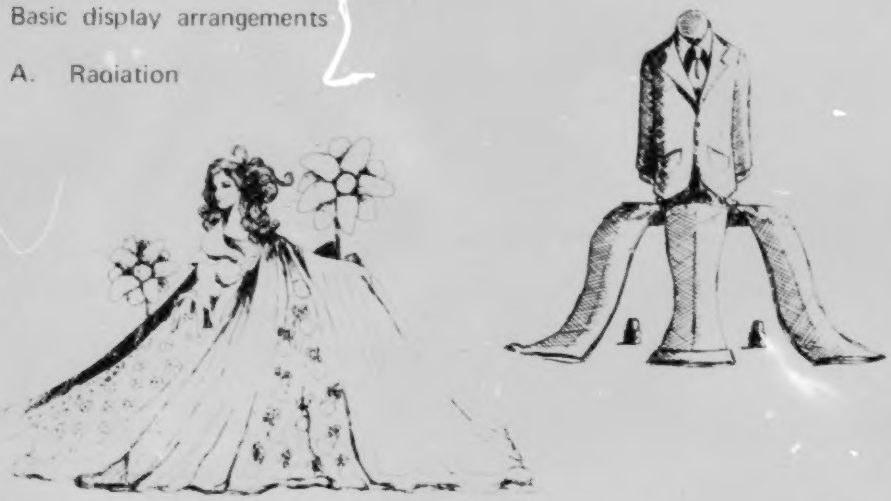
INFORMATION SHEET

E. Gradation--Connecting points of the display by a series of steps from light to dark or from small to large (Transparency 31)

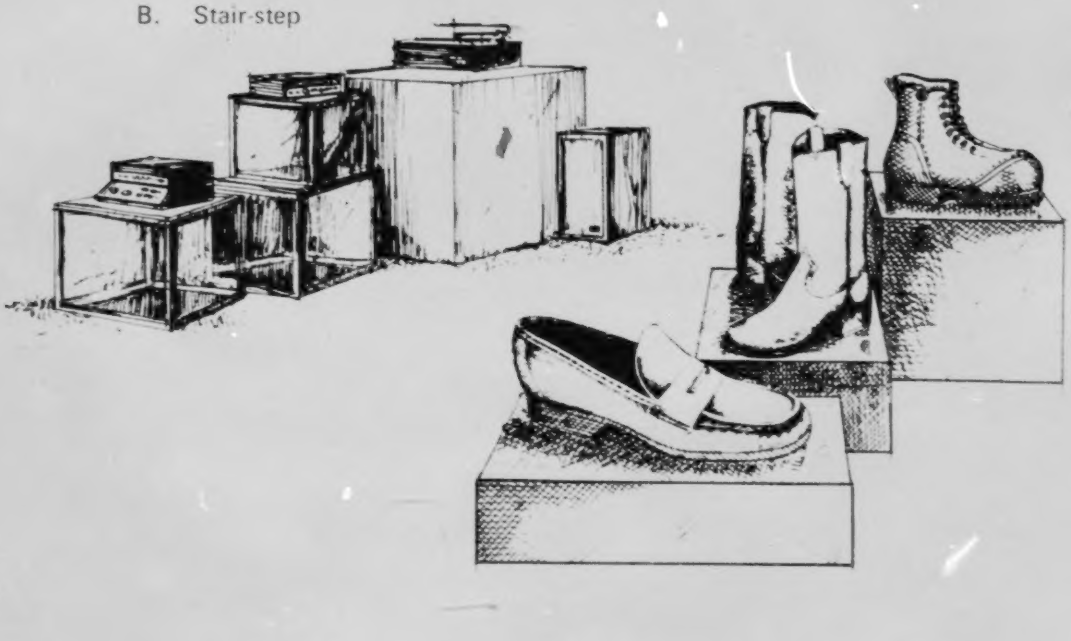
F. Interference--Overlapping items to create a feeling of relatedness between items (Transparency 31)

VI. Basic display arrangements

A. Radiation

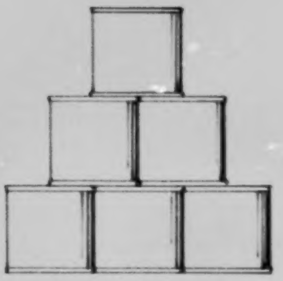


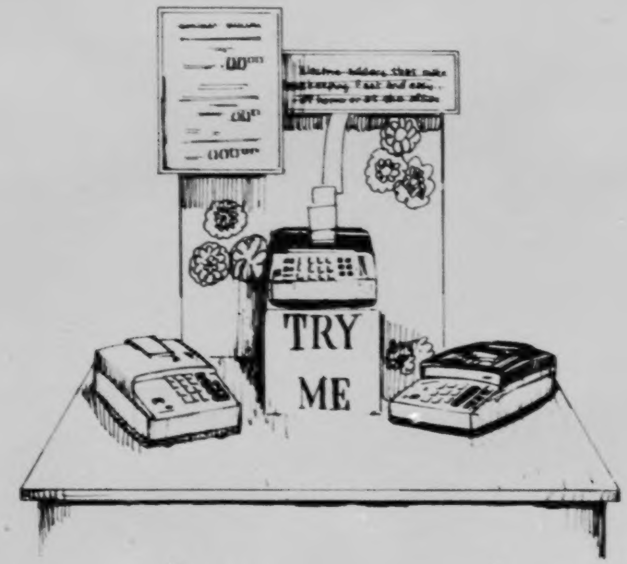
B. Stair-step



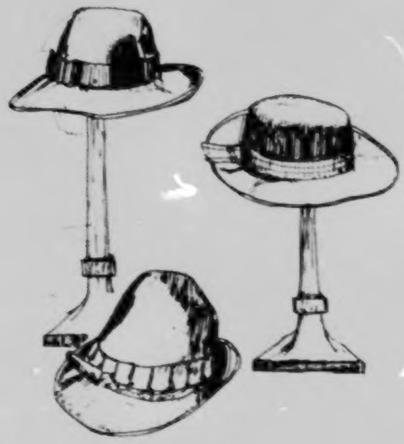
INFORMATION SHEET

C. Pyramid

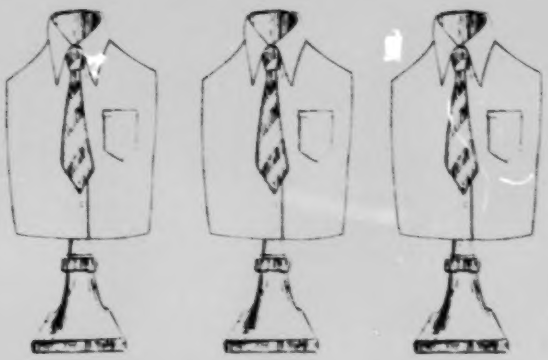




D. Zig-zag

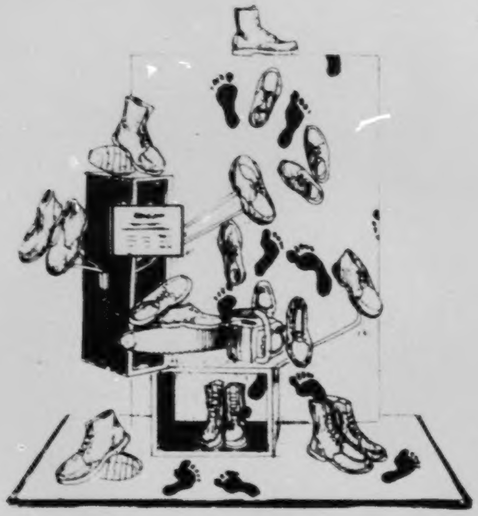


E. Repetition

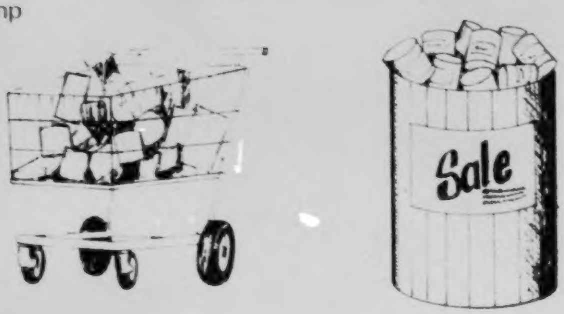


INFORMATION SHEET

F. Mass



G. Dump



VII. Impression given by the number of items in a display

A. Large number of items gives the feeling of bargains

B. Single item or a small number of items and accessories gives a feeling of prestige and exclusiveness

VIII. Use of color in displays

A. Use white light on merchandise

(NOTE: Colored lights shining directly on merchandise often distort the true color of merchandise.)

B. Use one dominant color scheme and then any other colors that blend or serve as tasteful contrasts

(NOTE: Using a large variety of colors or all bright colors may be distracting.)

INFORMATION SHEET

C. Avoid placing in direct sunlight any items with colors that will fade

D. Be aware of the psychology of colors for backgrounds and merchandise

Examples: Yellow is cheerful, warm, and suggests springtime; a black background gives the impression of space and leaves room for the imagination

E. Remember that the theme of a display may center around a color

IX. Lighting techniques

A. Emphasize the merchandise and not the background

B. Have brightest light on the dominant part of the display

C. Avoid glare

D. Avoid shadows unless they are used for special effects

E. Avoid lighting which would not show true color of merchandise

F. Hide lighting fixtures from view

G. Work with lighting at night to discover its full effect

X. Handling customer's request for merchandise on display

A. Know what merchandise from your department is on display

(NOTE: This will prevent some unnecessary checking and give the customer confidence in the salesperson's knowledge of his/her department and merchandise. It may be helpful to leave a list of the merchandise and product information in the department when the merchandise is removed for display.)

Example: Color, size, and style of merchandise

B. Know where the merchandise is displayed

C. Check to see if requested merchandise is in stock before removing merchandise from a display

(NOTE: Many stores require a minimum stock before merchandise can be displayed. Also, most clothing displayed is usually either in small sizes because it looks neater in a display or in medium sizes because there is generally a larger supply of medium sizes.)

INFORMATION SHEET

D. Know the store's policy concerning displayed merchandise

    1. Immediate sale policy

        a. Remove merchandise yourself or ask the display department to do so

        b. Drape mannequins with a sheet

        c. Replace merchandise when time permits

    2. Delayed sale policy

        a. Explain courteously that merchandise is removed only on a scheduled day

        b. Give the customer the date when the merchandise will be available

        c. Offer to take an order for the merchandise or to hold it for customer

        d. Mark the merchandise according to store policy so it will only be sold once

XI. Placement of interior displays

(NOTE: Interior displays should not block the view from front to back of store. This helps salespeople to see customers and, thus, aids in prevention of shoplifting.)

A. To the right side of doors

(NOTE: Most people tend to look and move to the right first.)

B. Near elevators, escalators, and stairs

C. At the ends of aisles

D. On ledges

E. At eye level

(NOTE: Display high-profit items at eye level and low profit items on bottom shelves.)

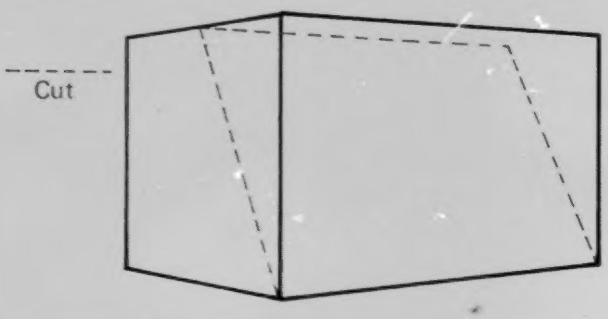
INFORMATION SHEET

XII. Types of displays made from stacking boxes

(NOTE: Stacking boxes is an excellent method for selling fast-moving merchandise. The boxes, of course, should be removed from the stack when they are nearly empty.)

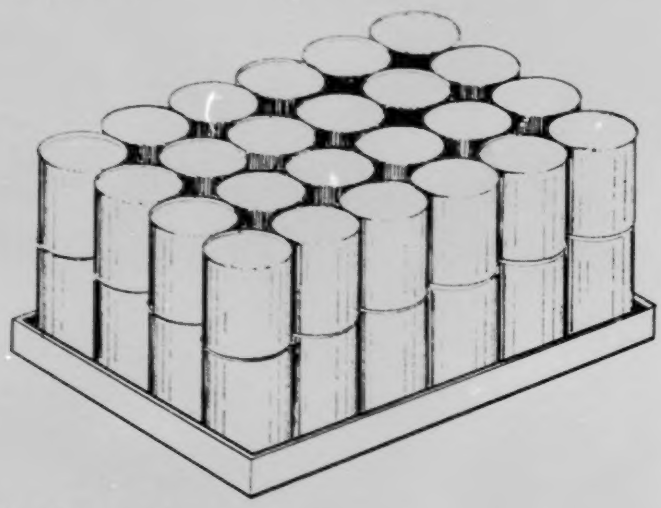
A. Window-cut case

(NOTE: These are made by removing the top and one side of a box. Caution should be taken not to cut so deeply that merchandise might be damaged.)



B. Tray-cut case

(NOTE: These not only sell merchandise but save 50 percent shelf stocking time as well.)



XIII. Parts of a show card

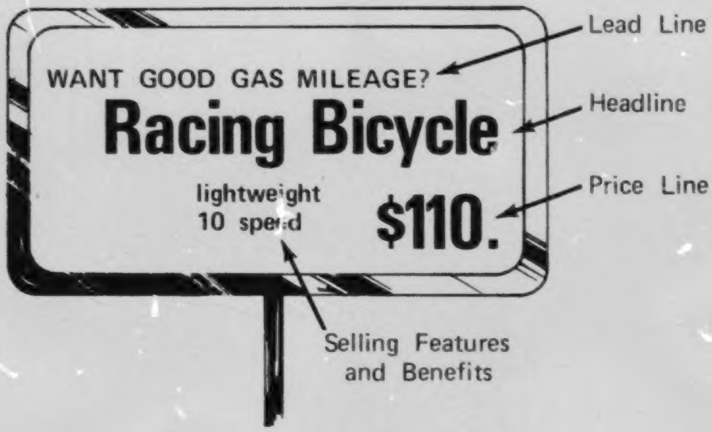
A. Lead line

B. Headline

INFORMATION SHEET

C. Selling features and benefits

D. Price line


WANT GOOD GAS MILEAGE?
Racing Bicycle
lightweight
10 speed
$110.
Lead Line
Headline
Price Line
Selling Features and Benefits

XIV. Purposes of signs or show cards

A. To identify the product or idea

B. To show costs, manufacturer, uses, and/or benefits

C. To entice customers to buy

D. To give directions to location of merchandise in the store

XV. Factors to be considered in planning show card layouts (Assignment Sheets #3, #4, and #5)

A. Draw thumbnail sketches beforehand

B. Use generous margins on the card

C. Balance the layout

D. Write good copy

1. Keep it short

(NOTE: Don't try to give the entire selling message on the show card.)

2. Decide what features or benefits should be emphasized

Examples: Price, color, style, use, special feature

INFORMATION SHEET

3. Appeal to a specific audience

4. Use lettering style appropriate for the product

E. Make clear, legible letters (Transparency 32)

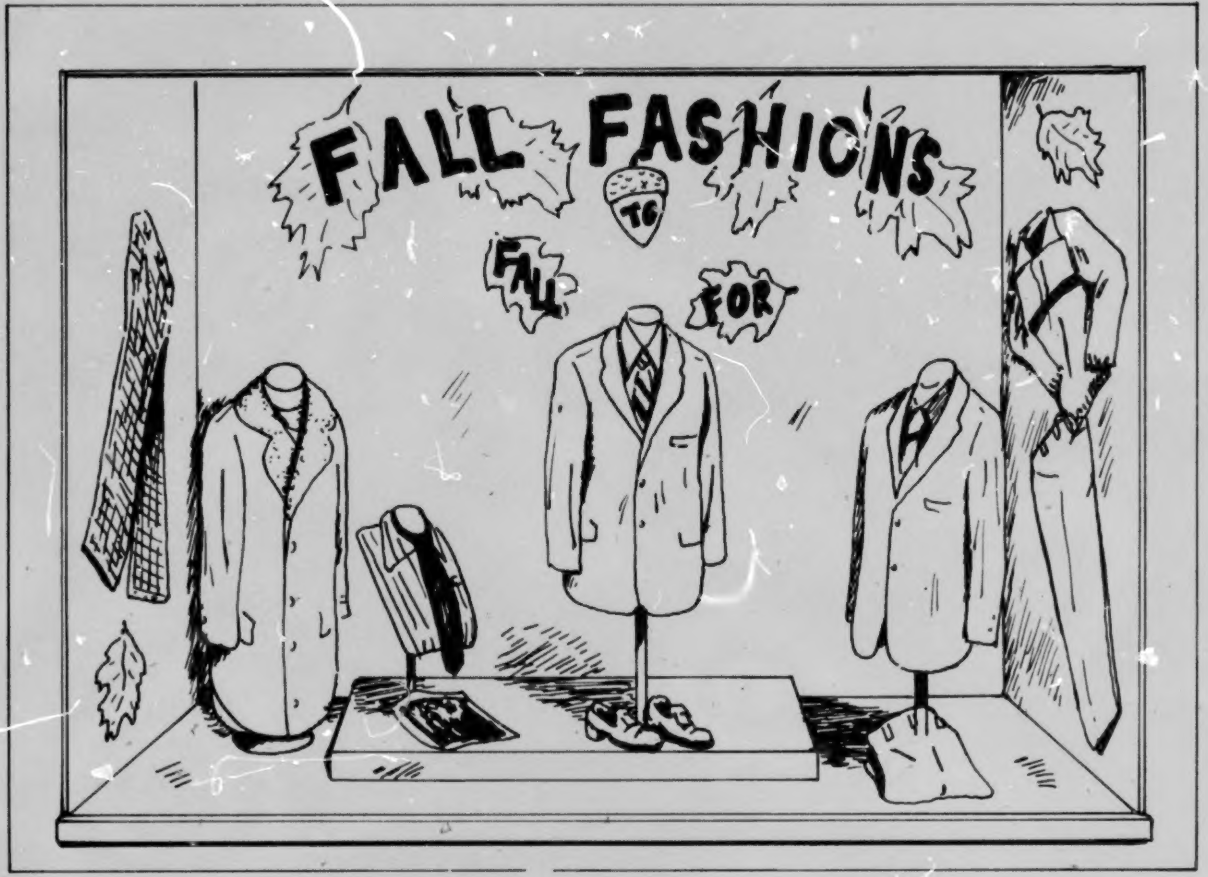
1. Space letters evenly

2. Have one or more full spaces between words

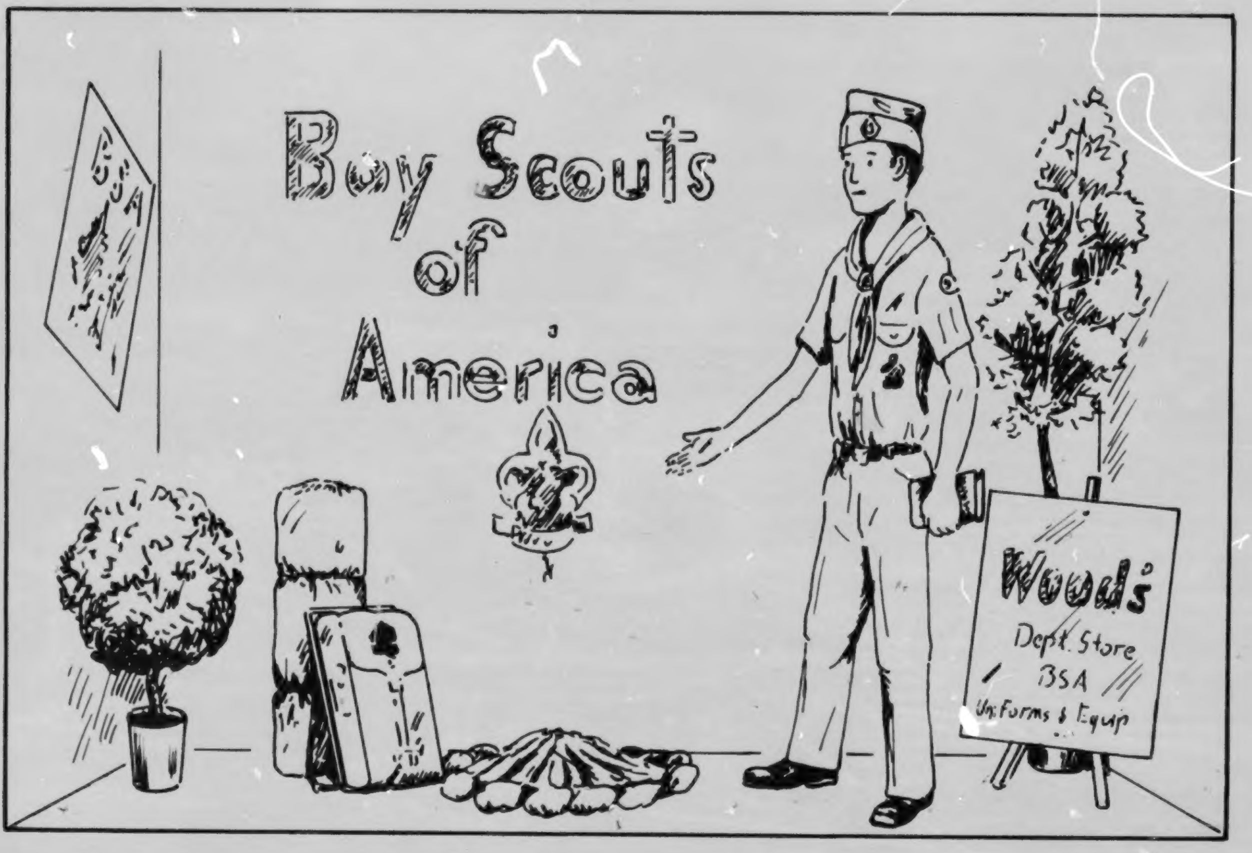
3. Be sure distance between lines is sufficient for easy reading

4. Use larger letters for more important copy

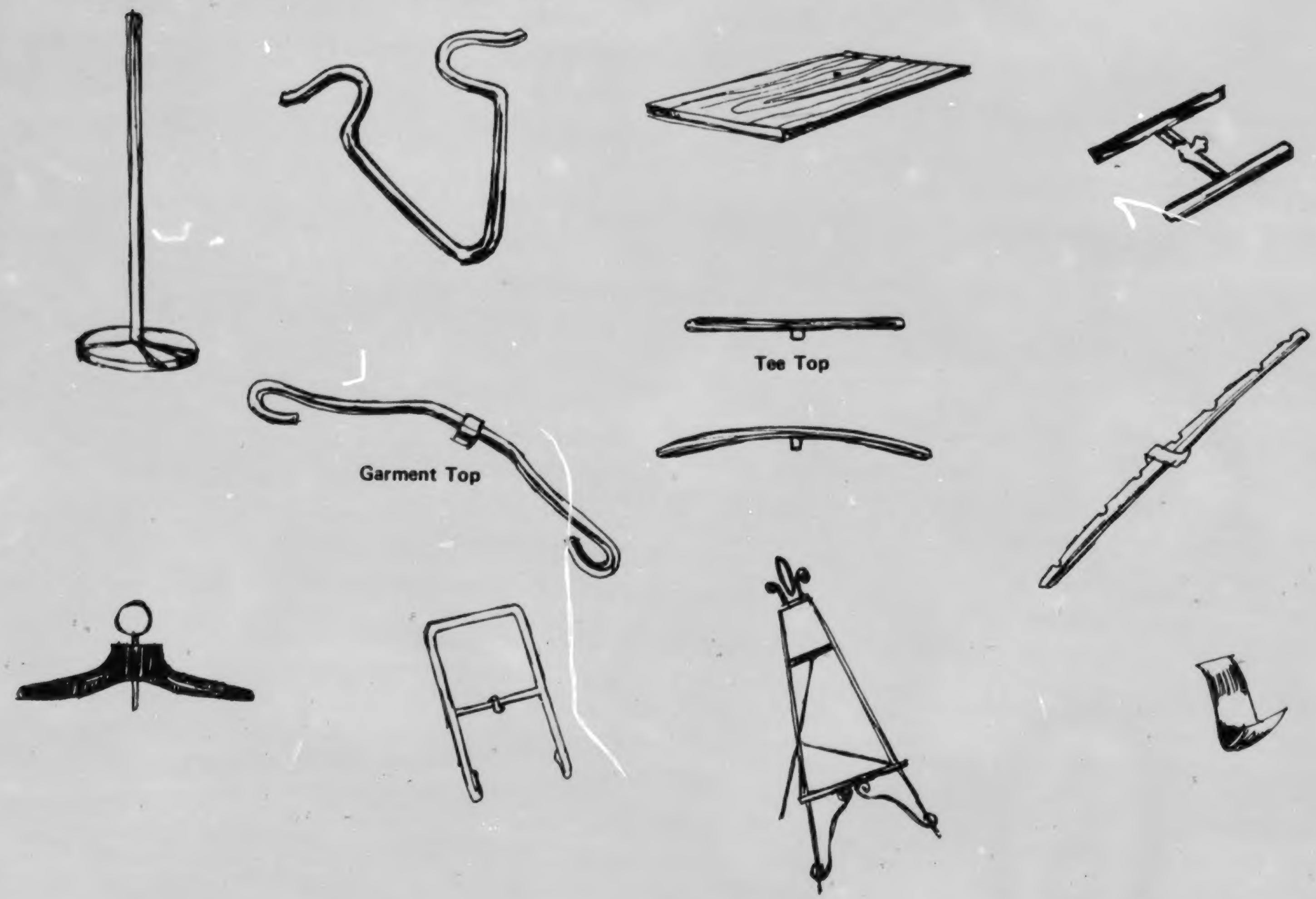
Promotional Display


FALL FASHIONS
TO
FALL
FOR

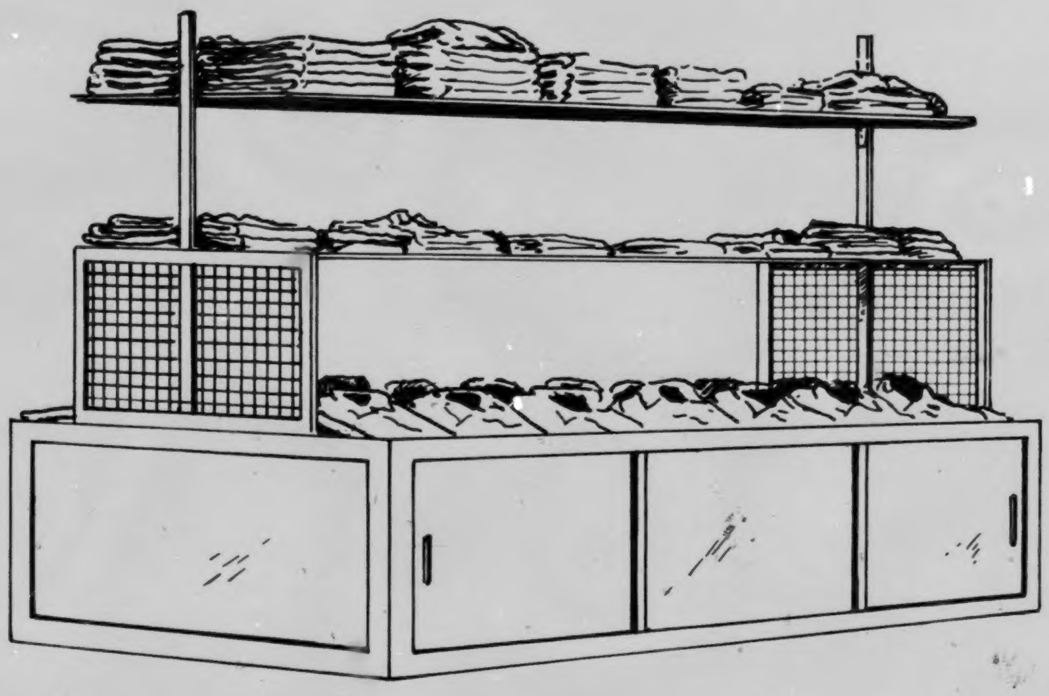
Institutional Display


BSA
Boy Scouts of America
Wood's
Dept. Store
BSA
Uniforms & Equip

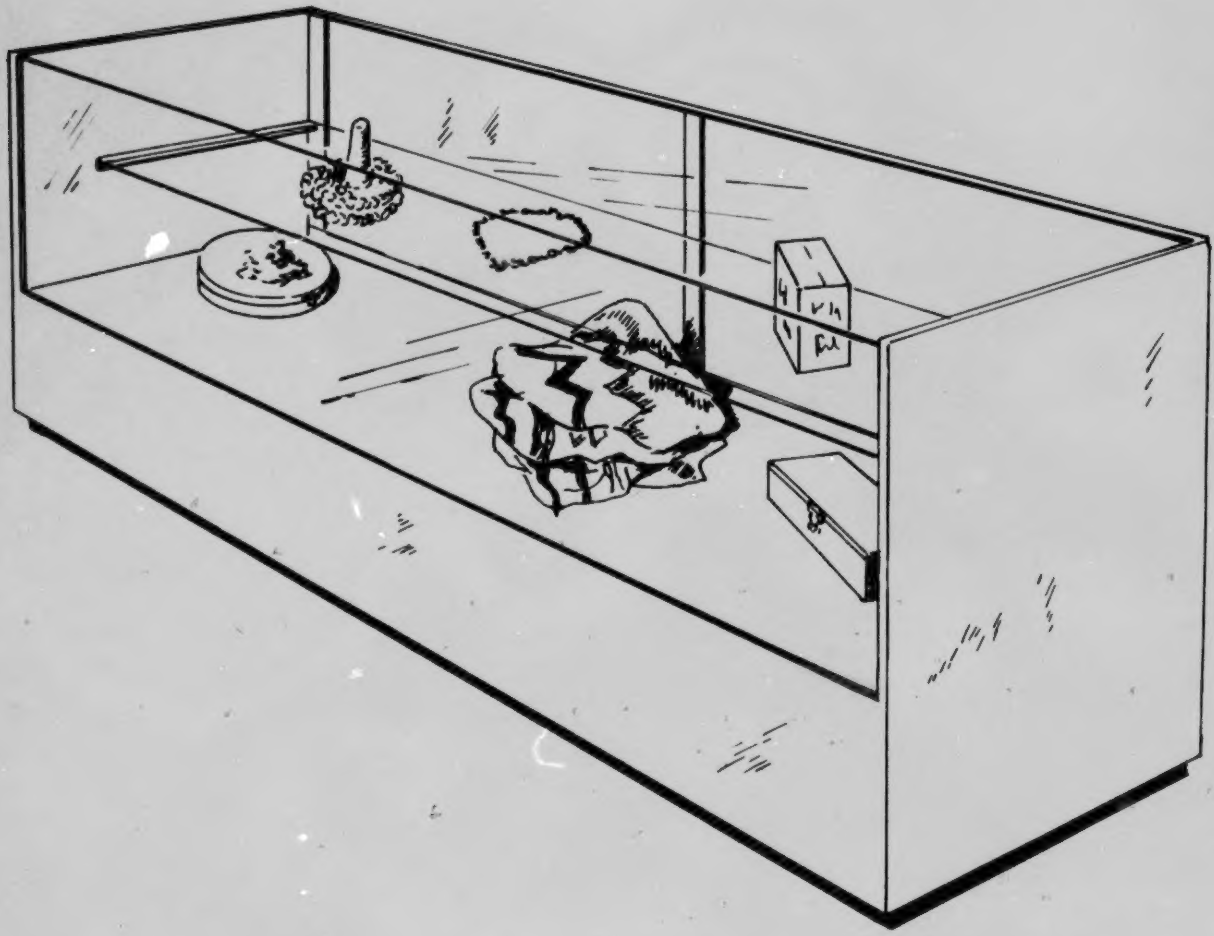
Basic Display Stands and Easels


Tee Top
Garment Top

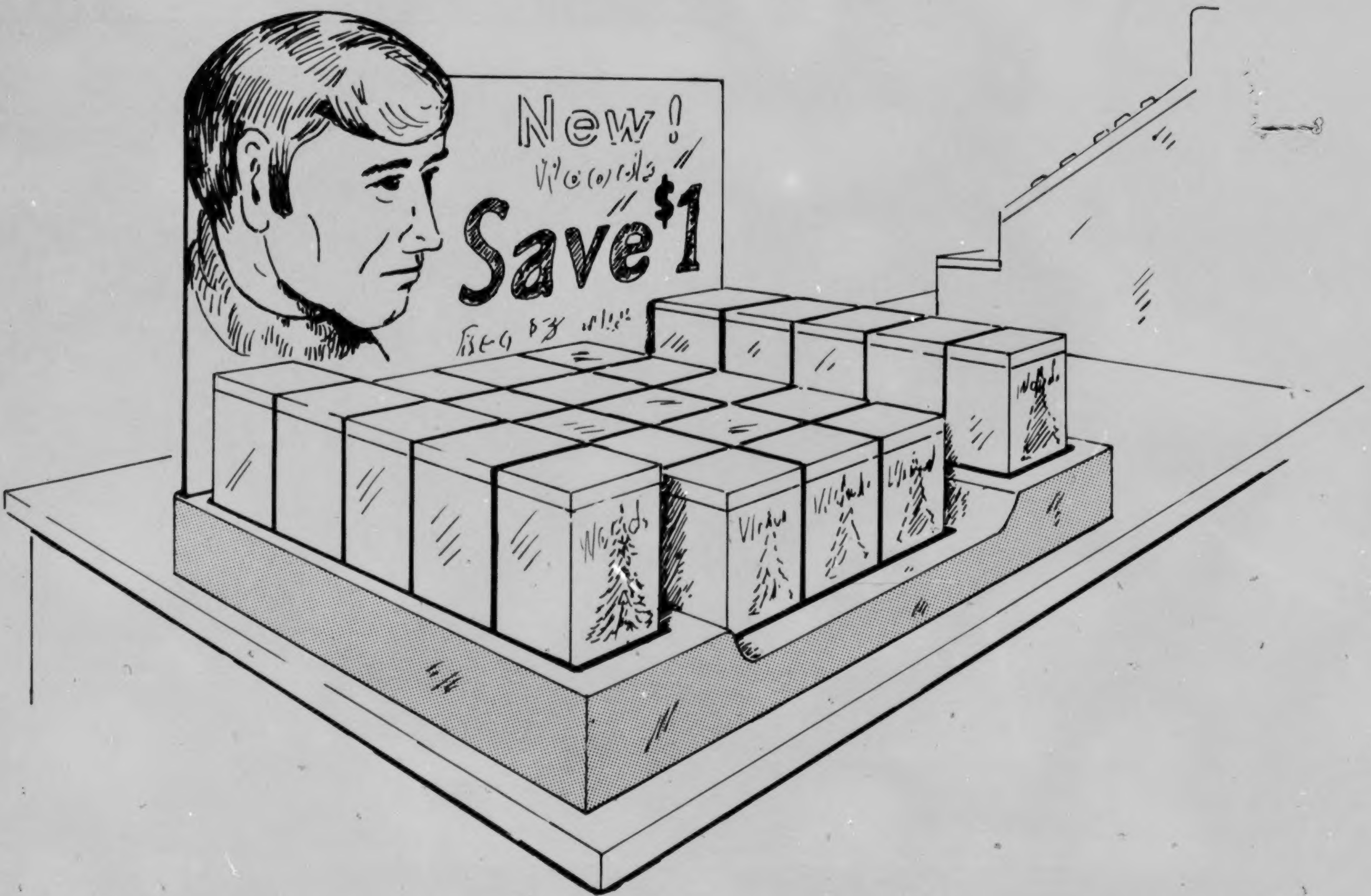
Open Display



Closed Display



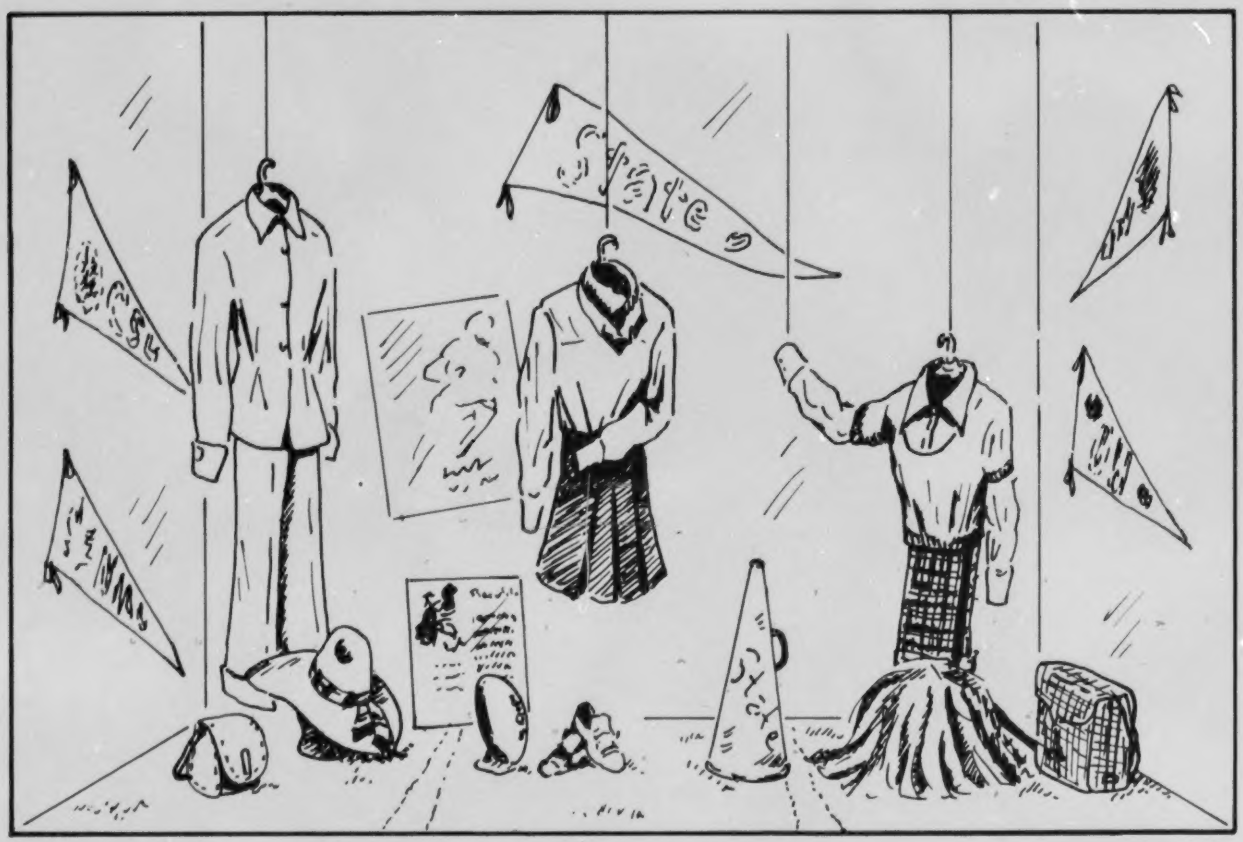
Point-of-Purchase Display


New!
Worlds
Save $1
Worlds
Worlds

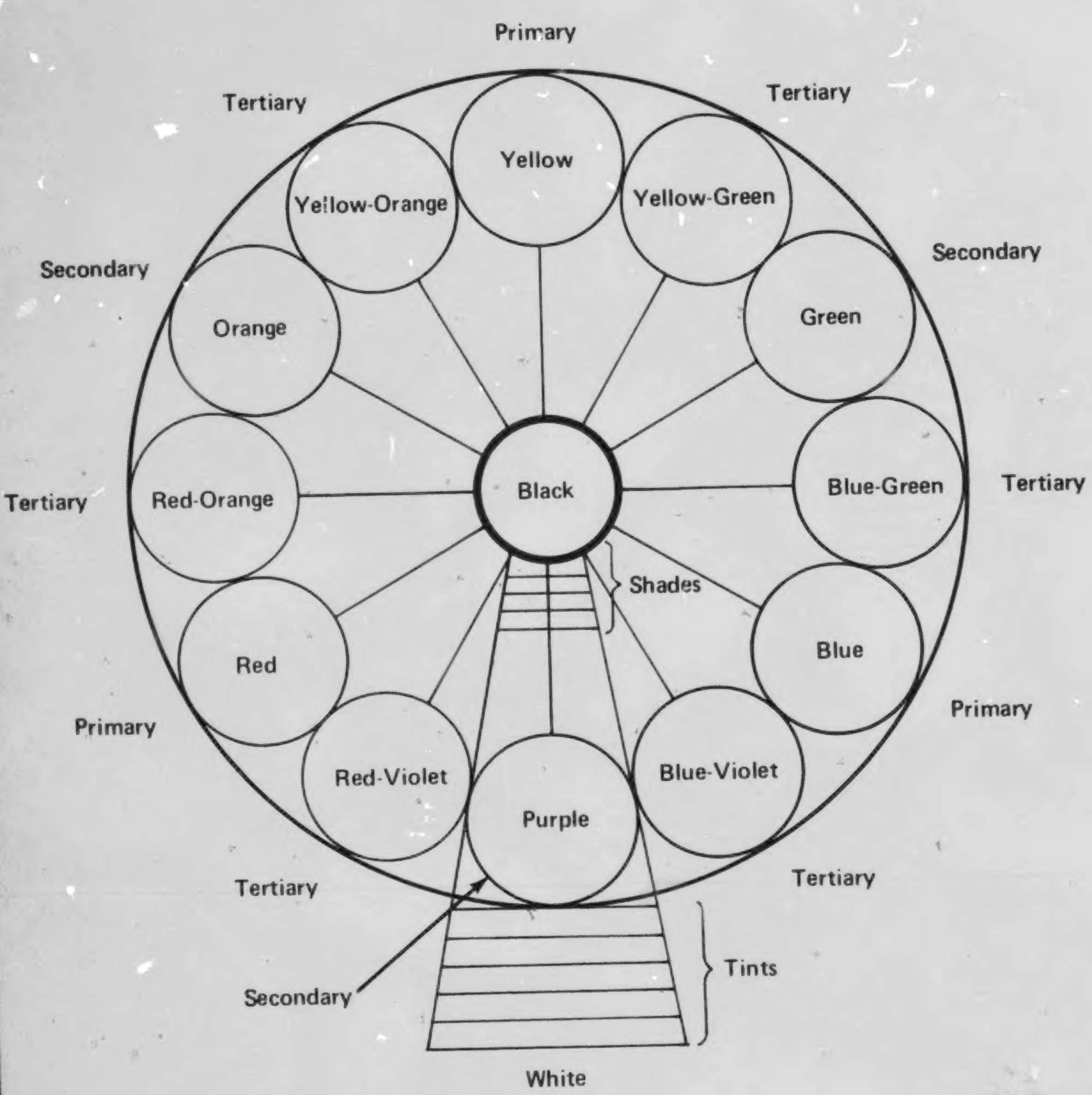
TM 6

DE II - 31-E

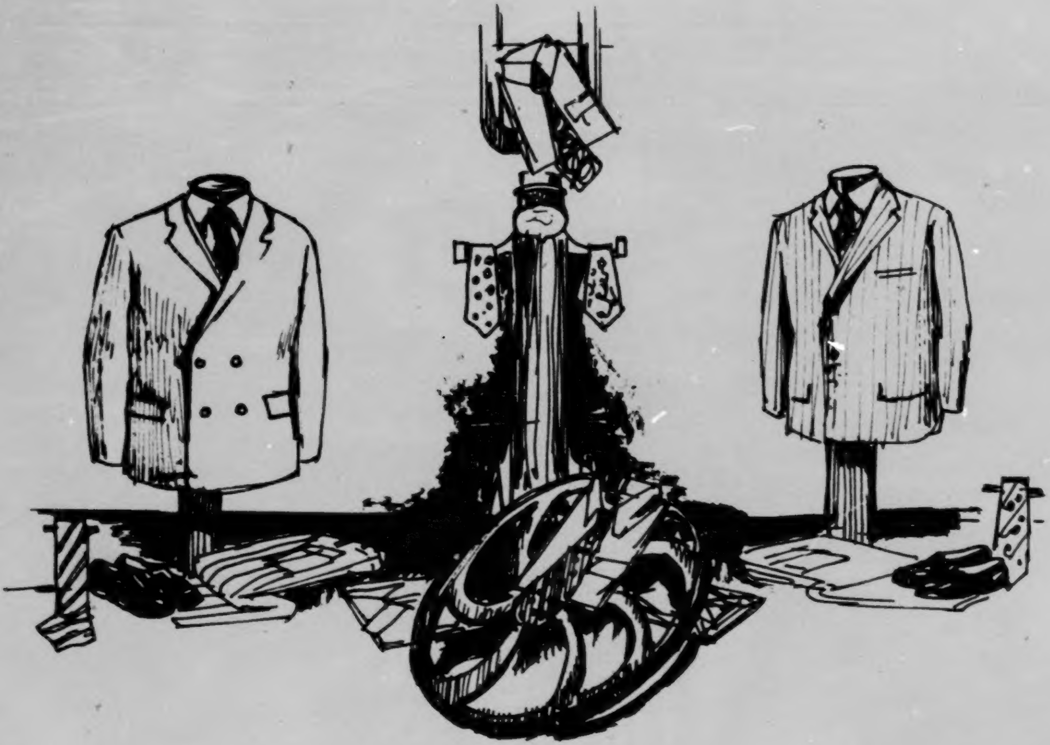
Suspension Display

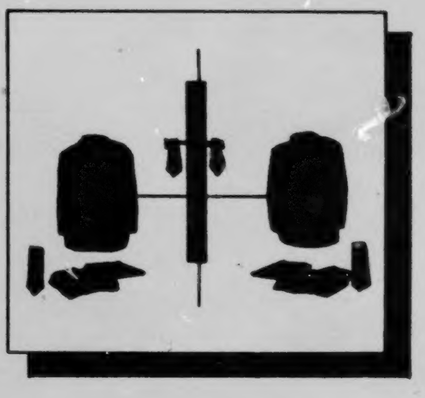

State
State

Color Wheel

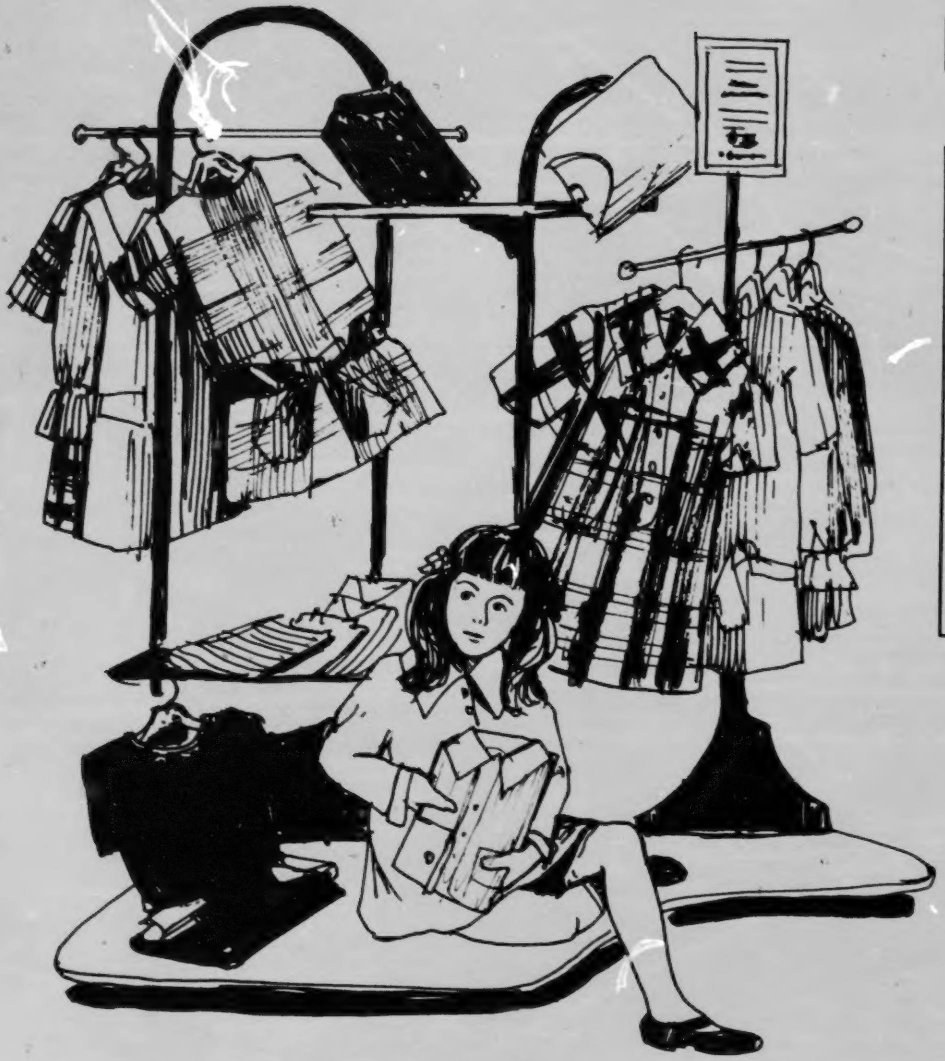

Primary
Tertiary
Tertiary
Yellow
Yellow-Orange
Yellow-Green
Secondary
Secondary
Orange
Green
Black
Tertiary
Red-Orange
Blue-Green
Tertiary
Shades
Red
Blue
Primary
Primary
Red-Violet
Purple
Blue-Violet
Tertiary
Tertiary
Secondary
Tints
White

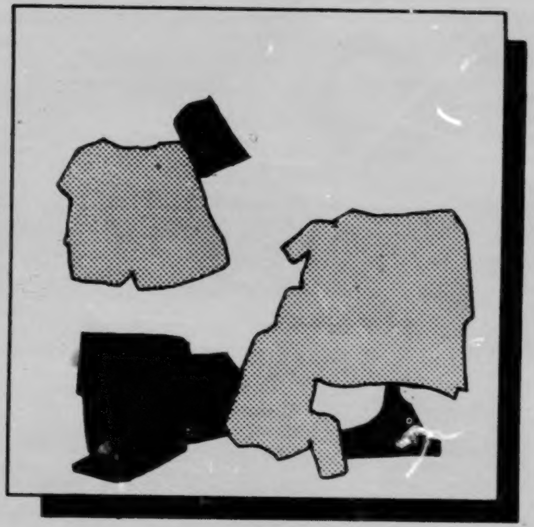
Formal Balance





Informal Balance

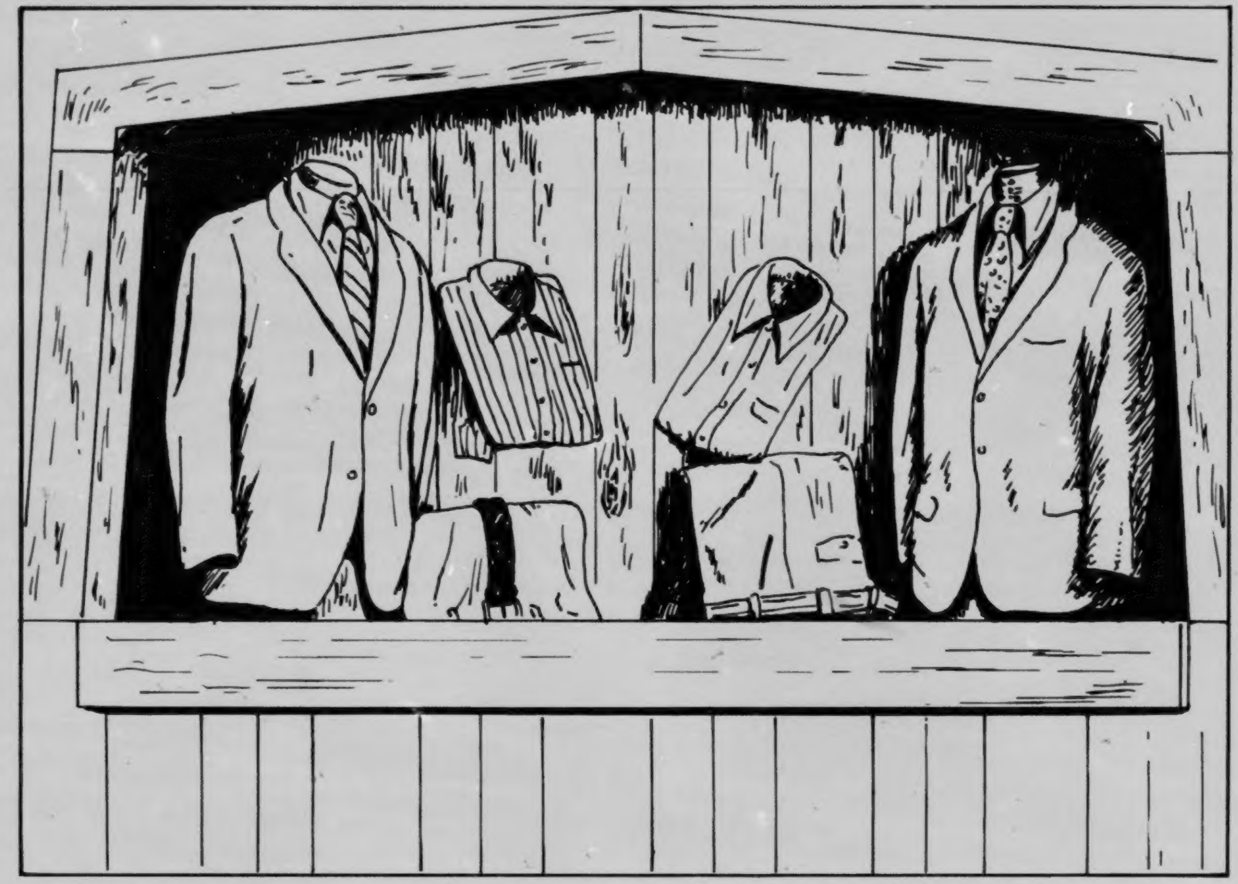




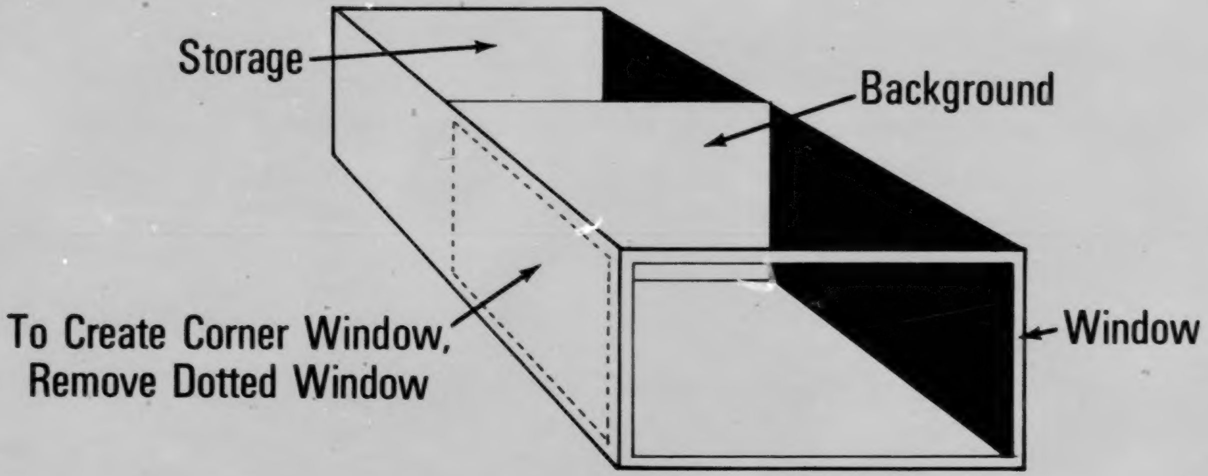
TM 10

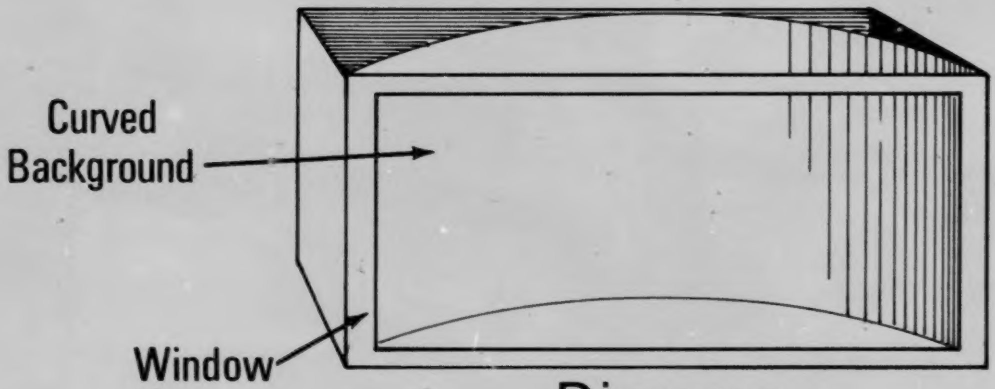
DE II - 39-E

Shadow Box Display



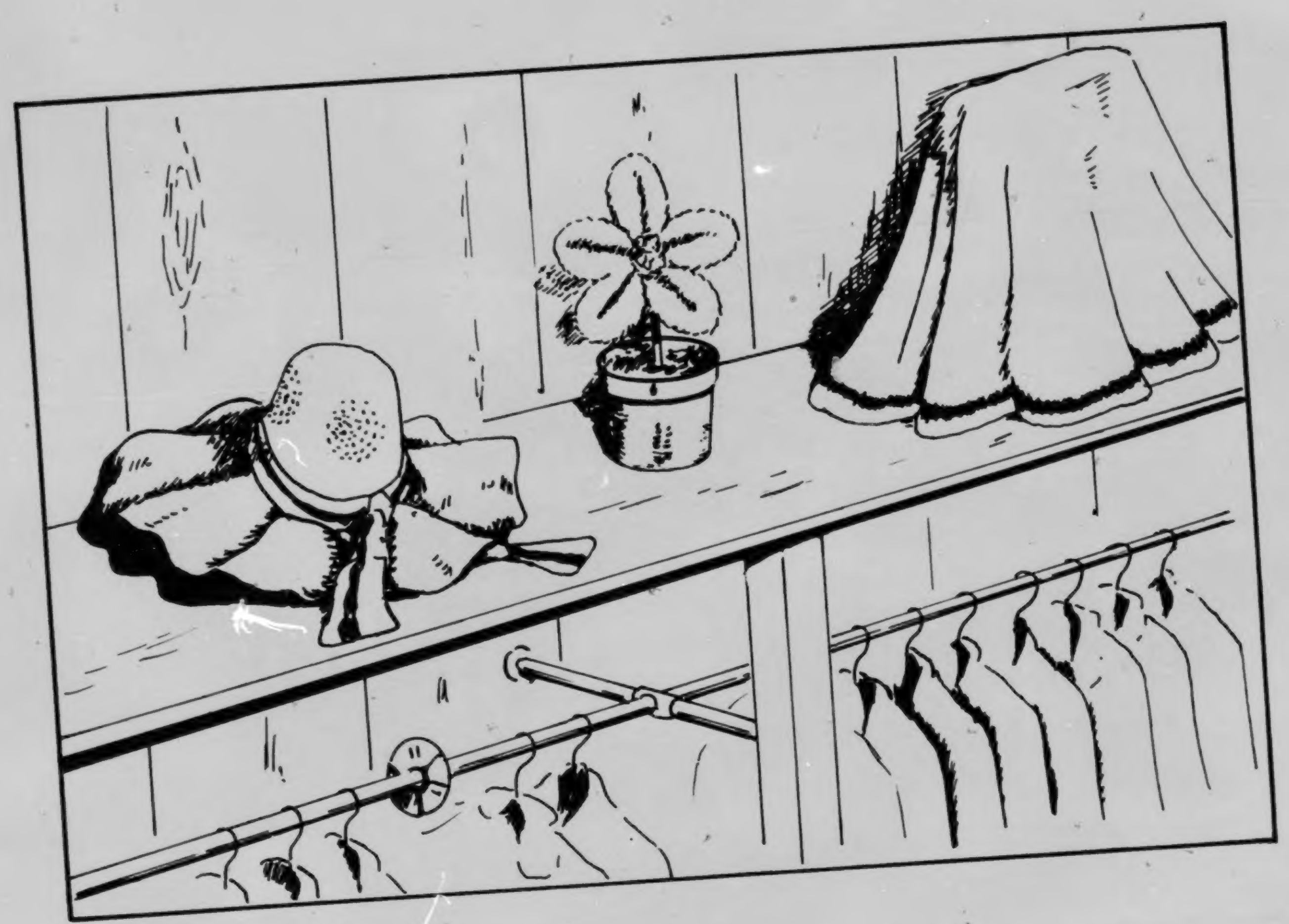
Shadow Box: An Easy Prop to Make


Storage
Background
To Create Corner Window, Remove Dotted Window
Window


Curved Background
Window

Diorama

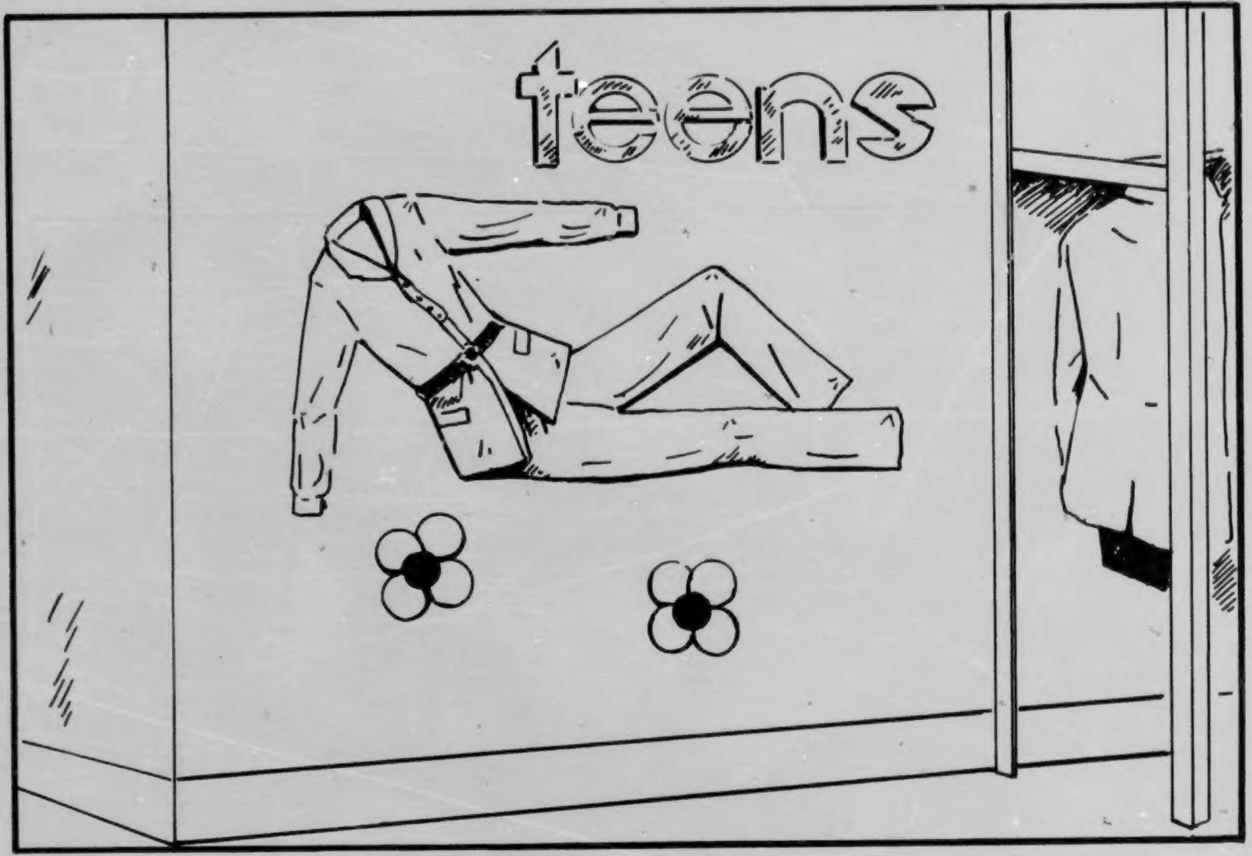
Ledge Display



TM 13

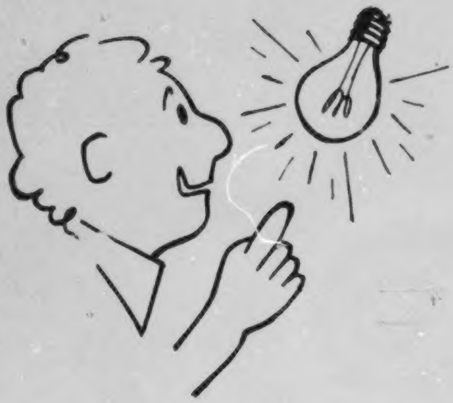
DE II · 45-E

Wall Display

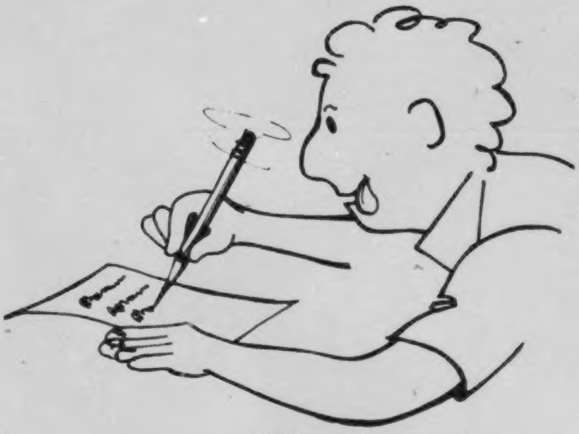


DE II - 49-E

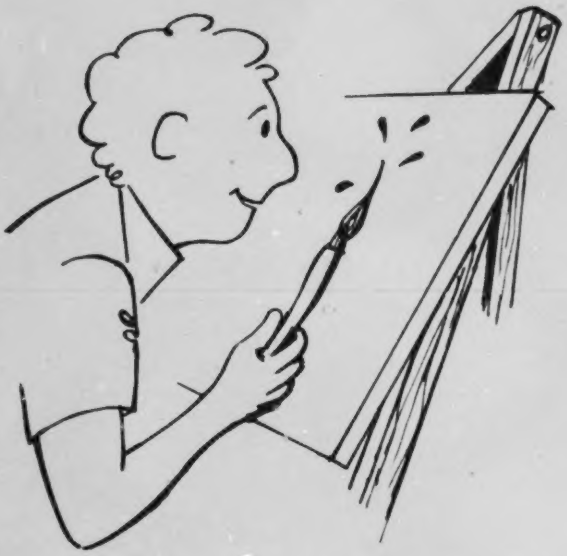
How To Construct A Display



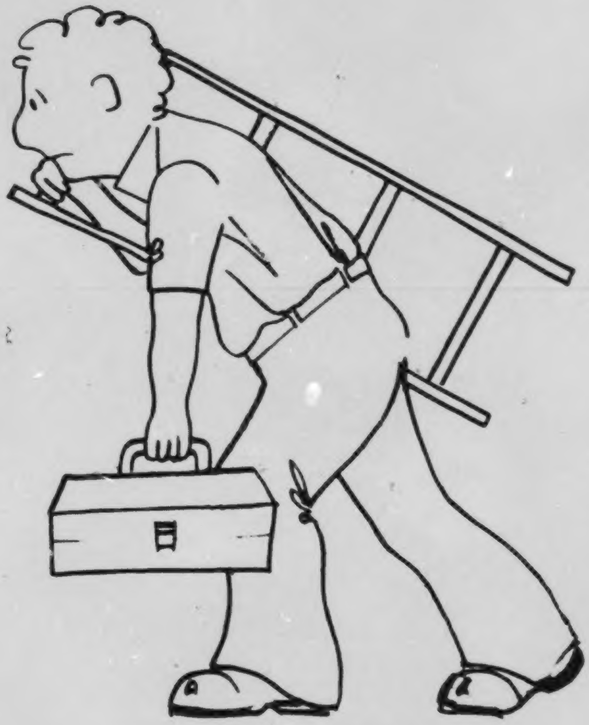
"Idea"



"Planning"



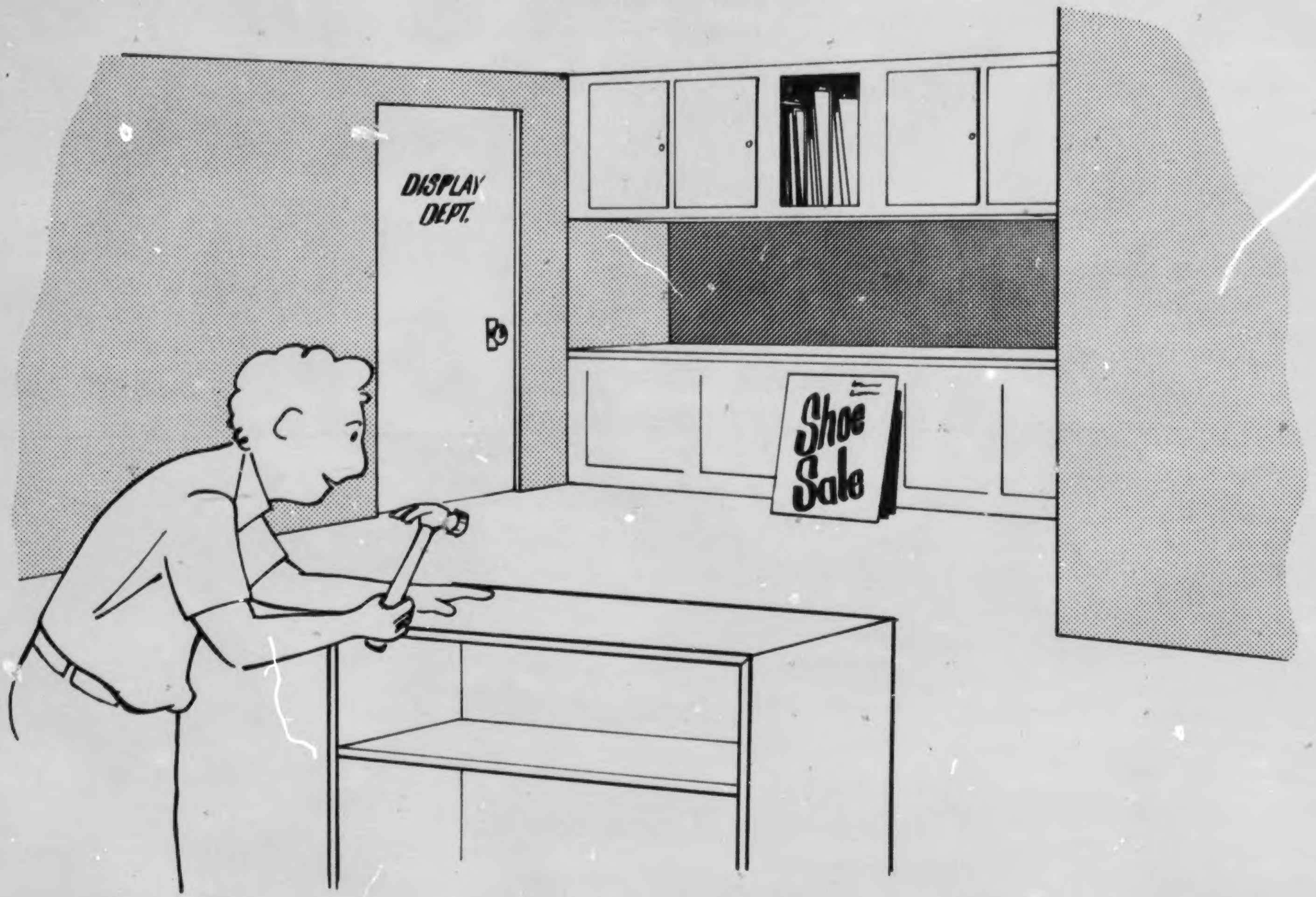
"Sketching"



"Gathering Material"

TM 15

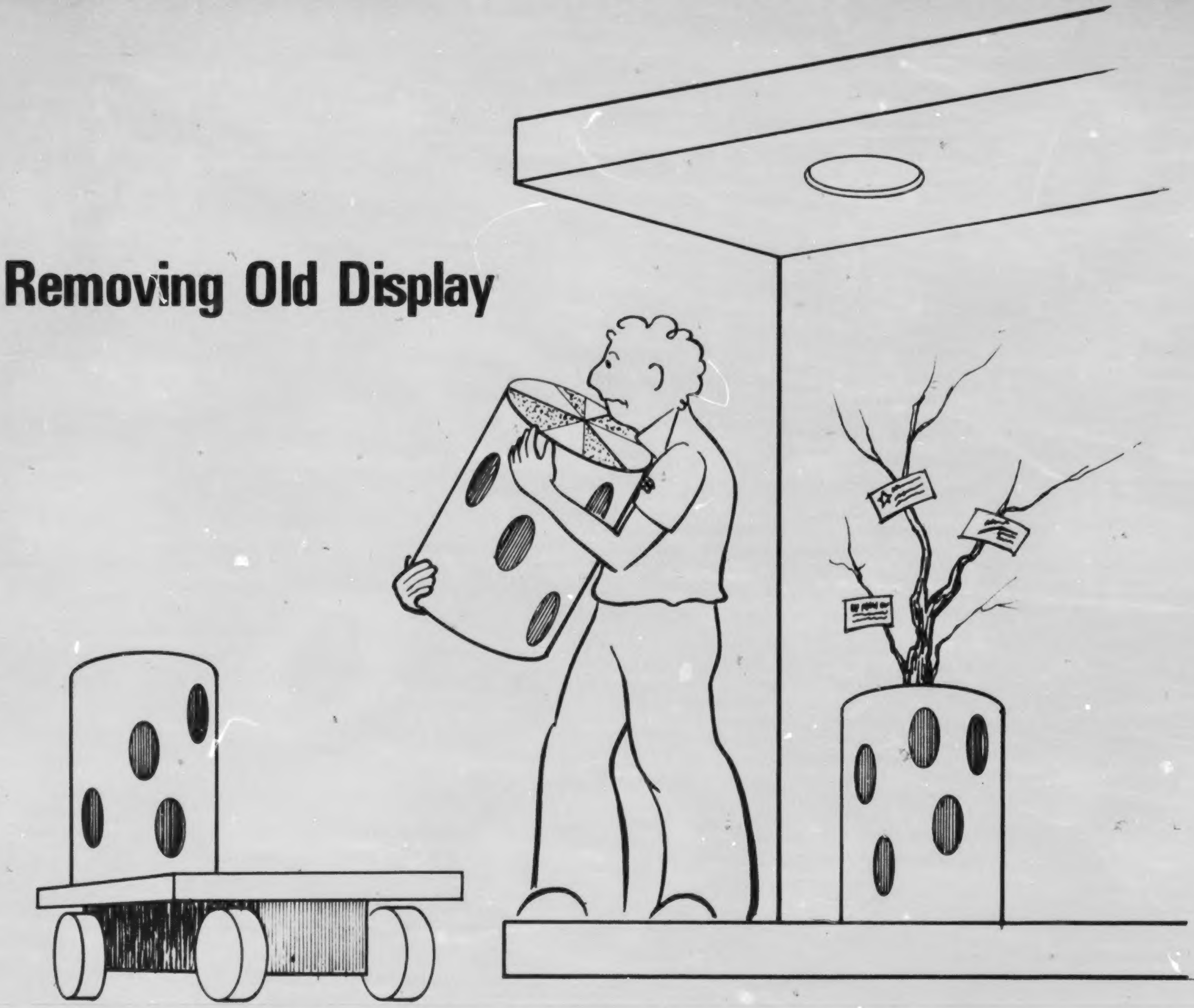
Workshop Scene


DISPLAY DEPT.
Shoe Sale

TM 16

DE II - 51-E

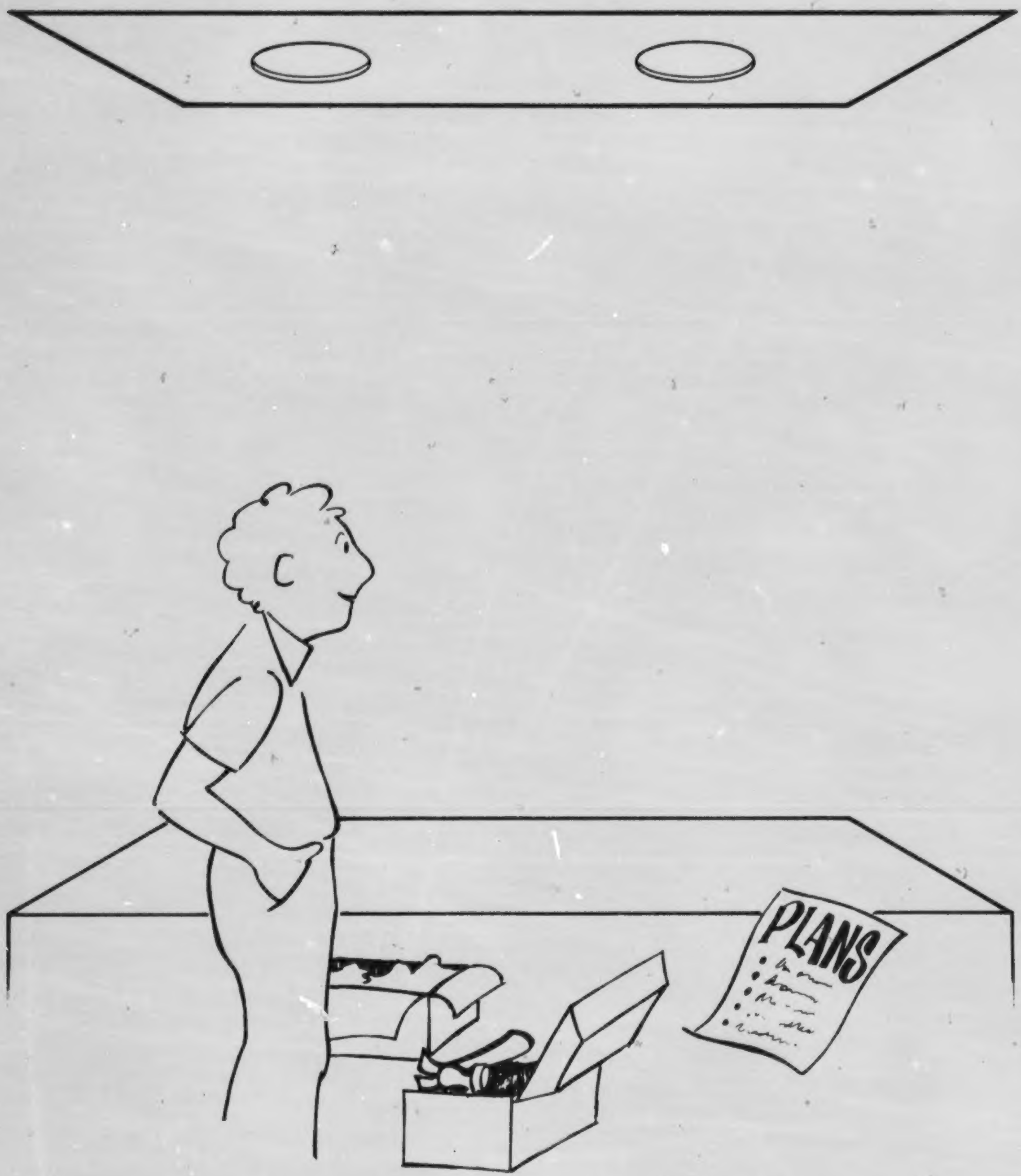
Removing Old Display



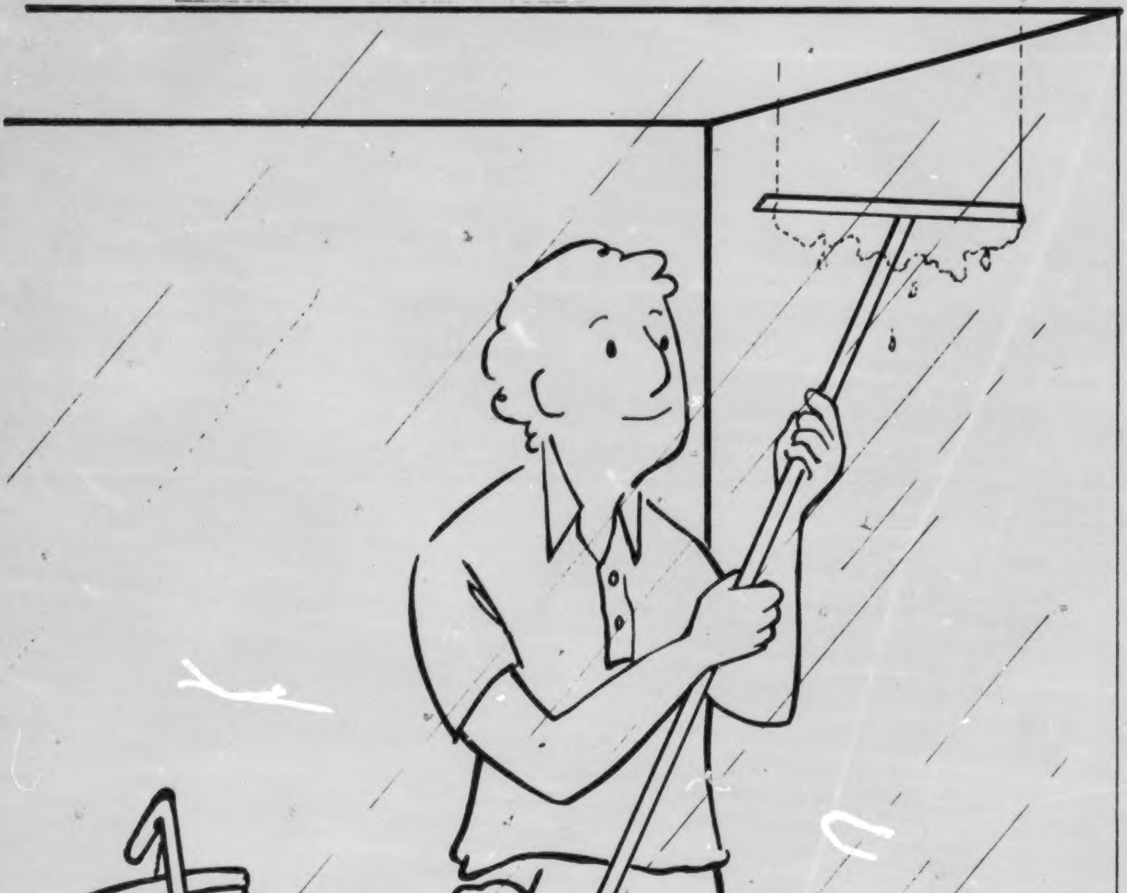
TM 17

DE II - 53-E

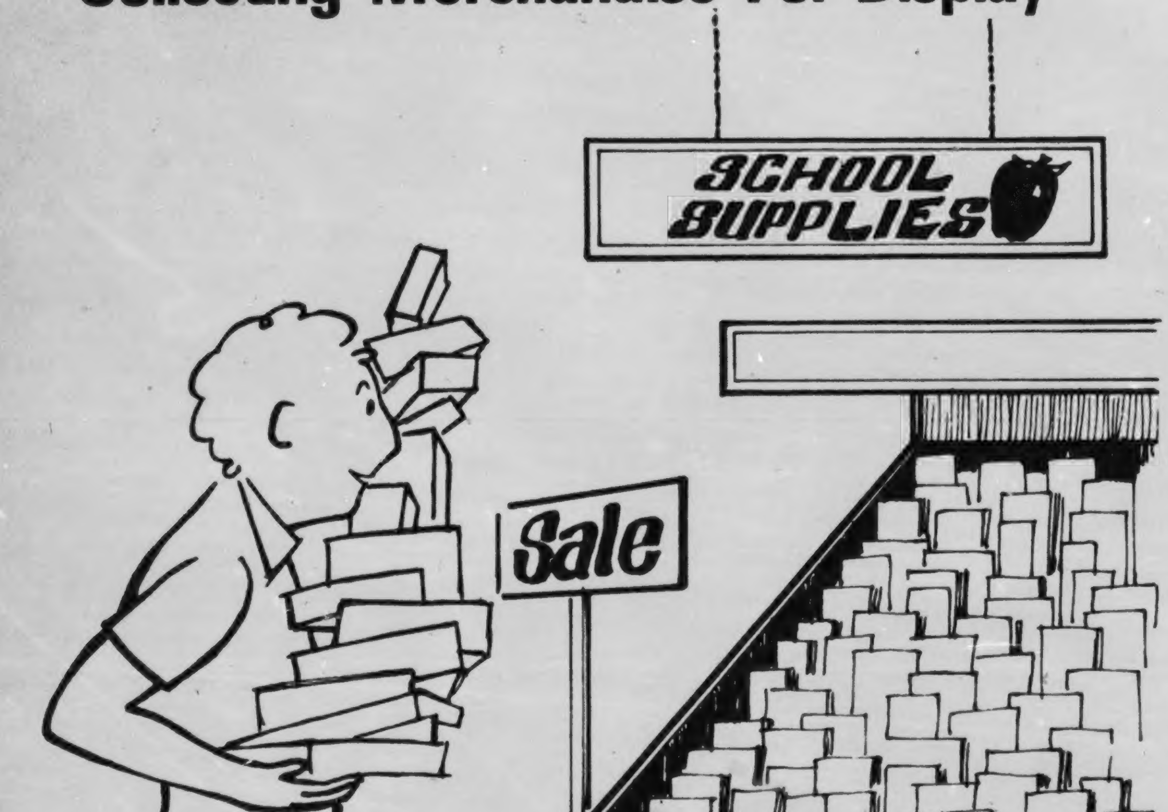
Display Area



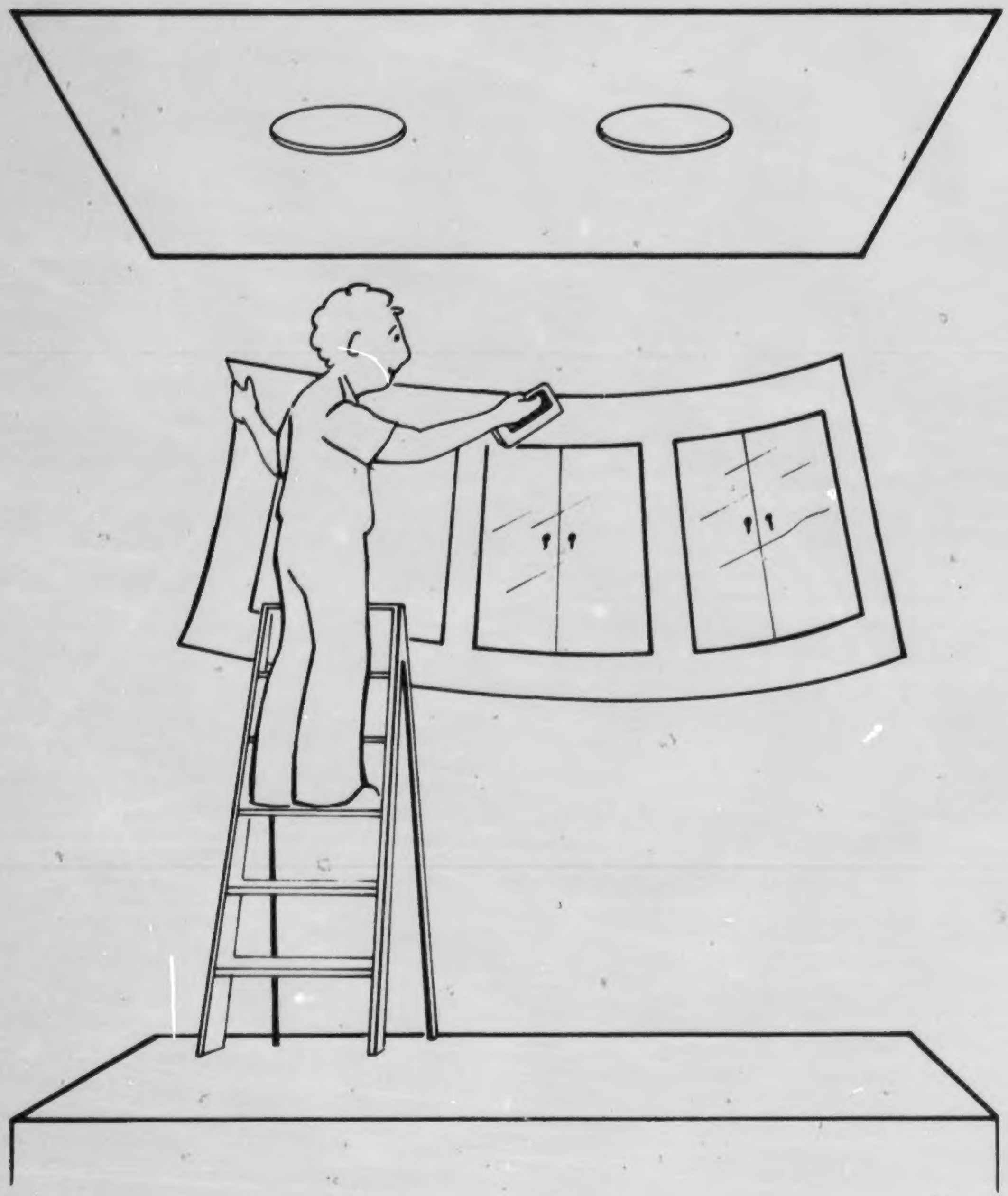
Cleaning the Display Area



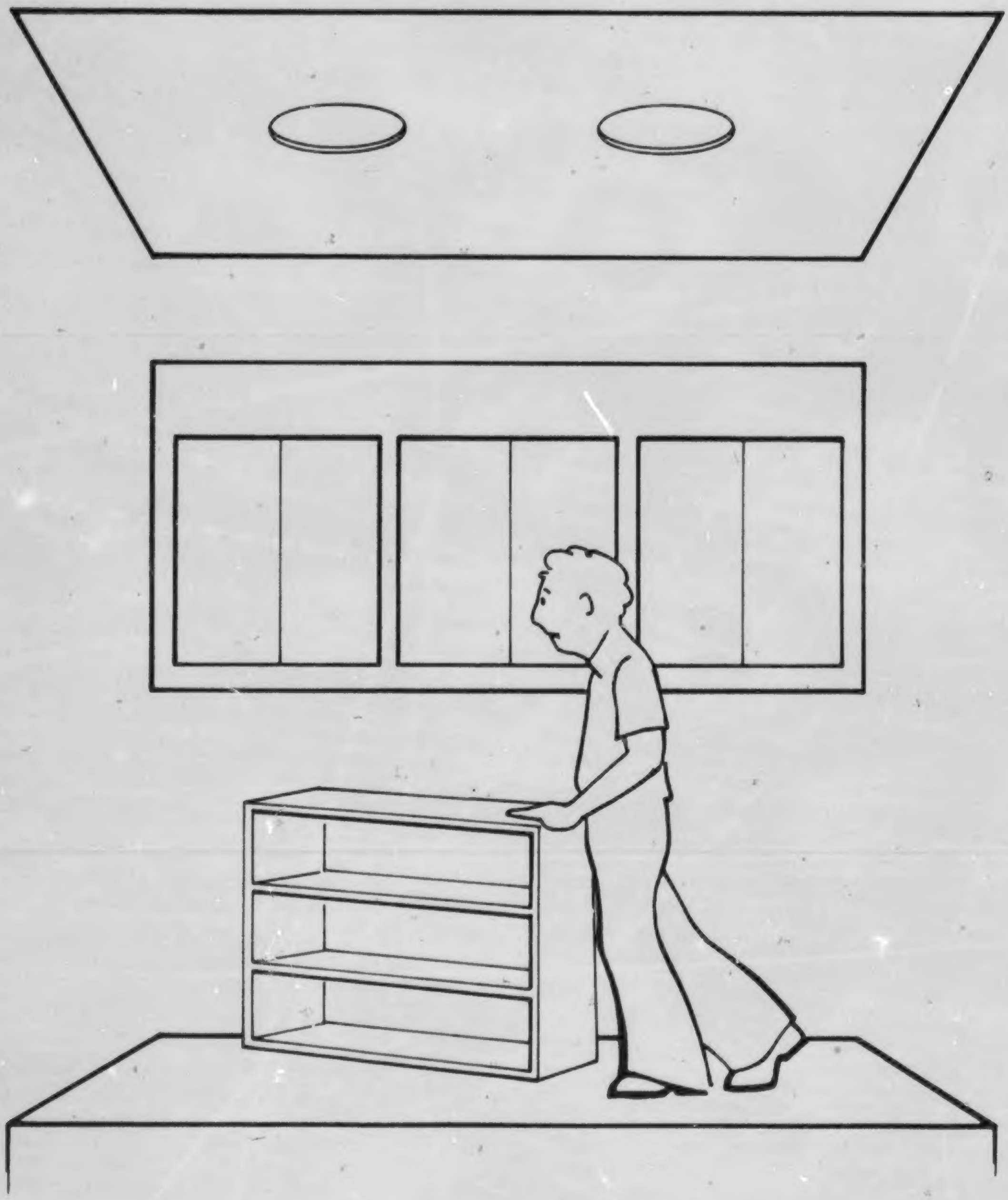
Collecting Merchandise For Display


SCHOOL SUPPLIES
Sale

Background

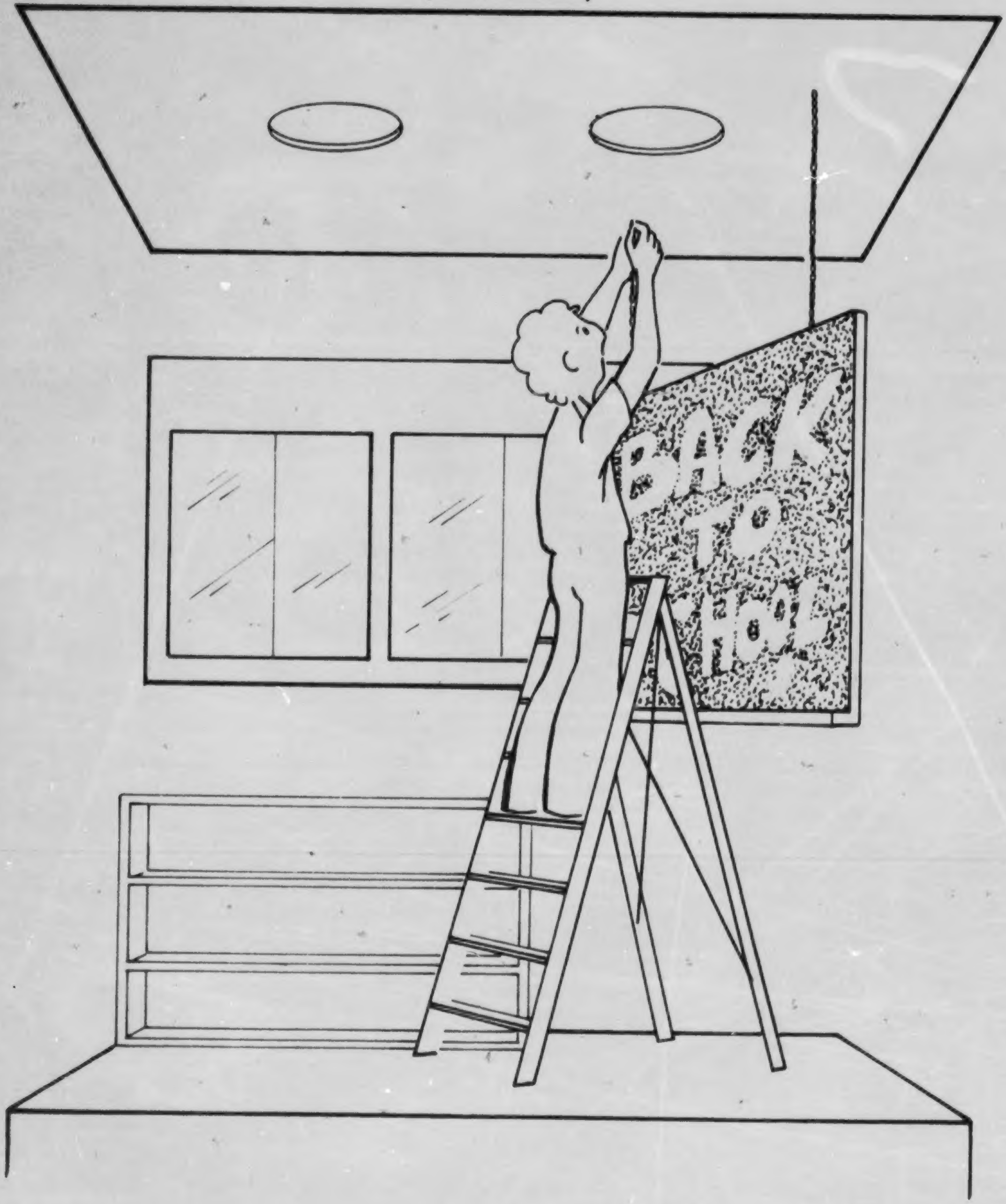


Props



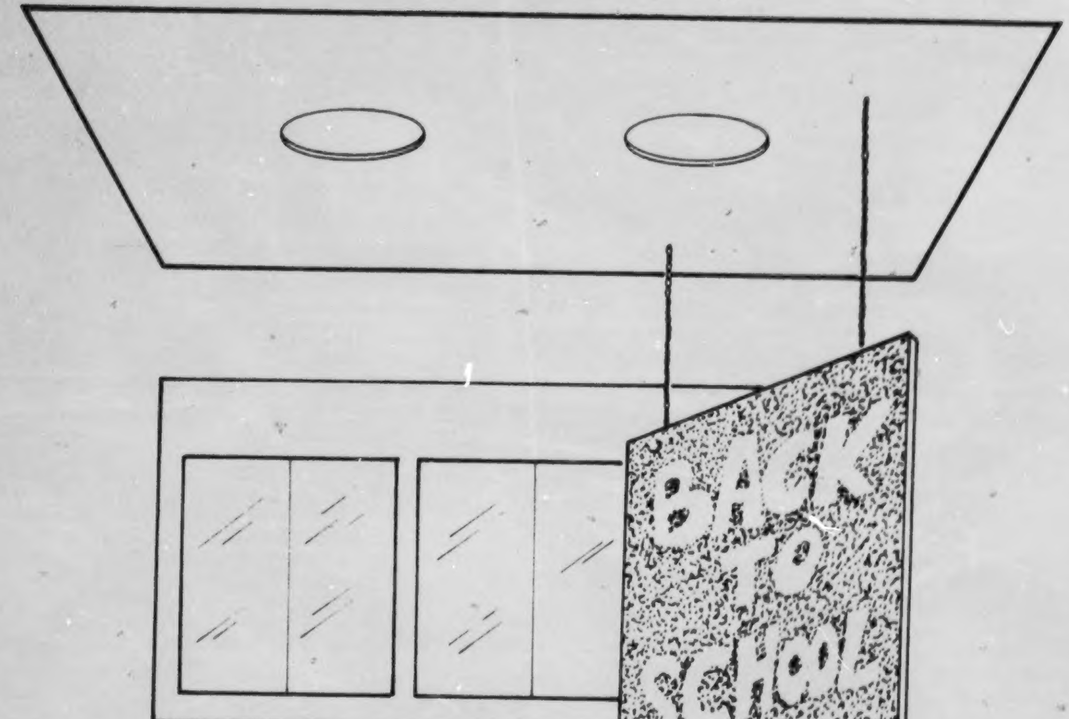
Props

(Continued)

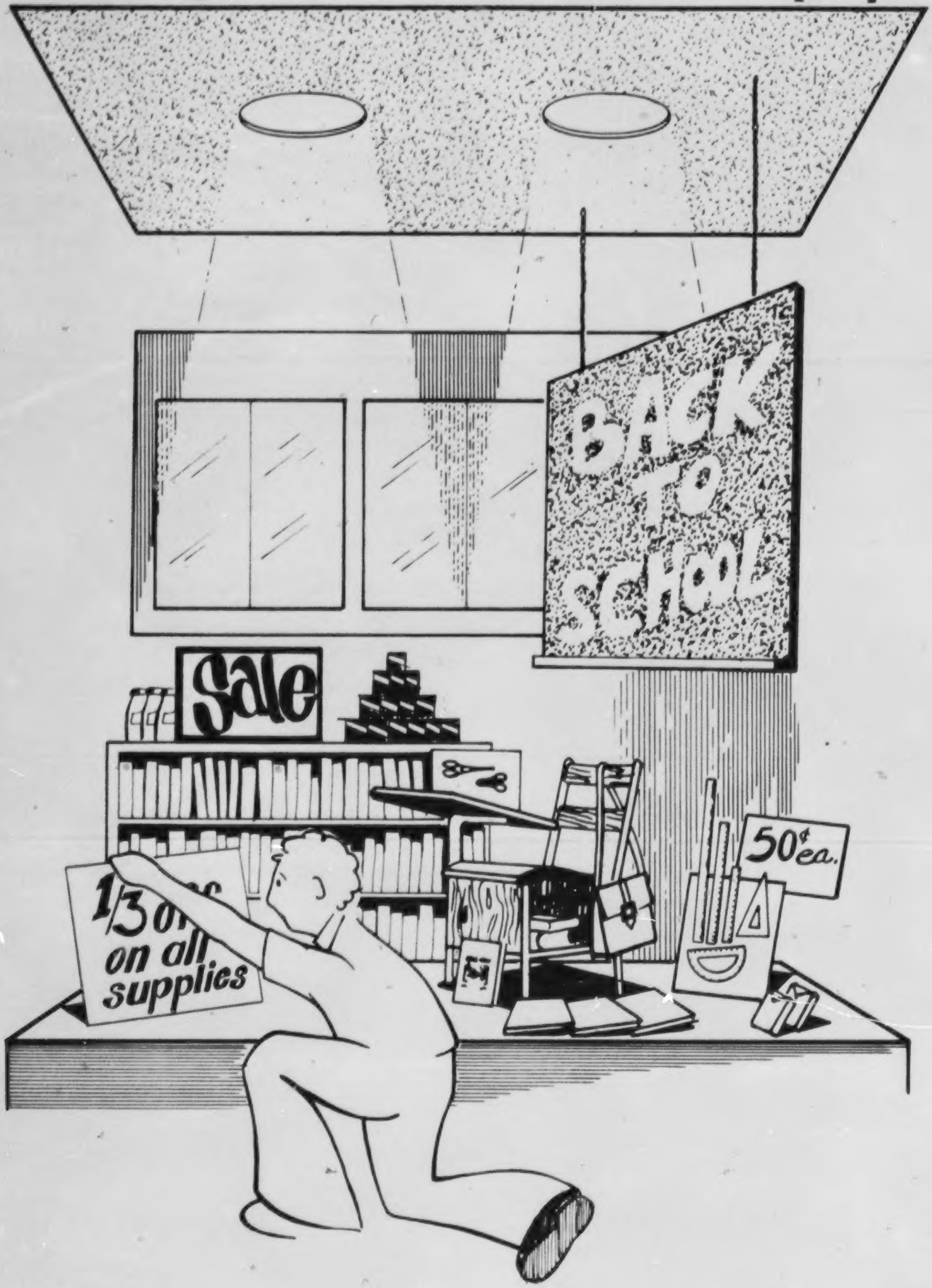

BACK TO SCHOOL

524

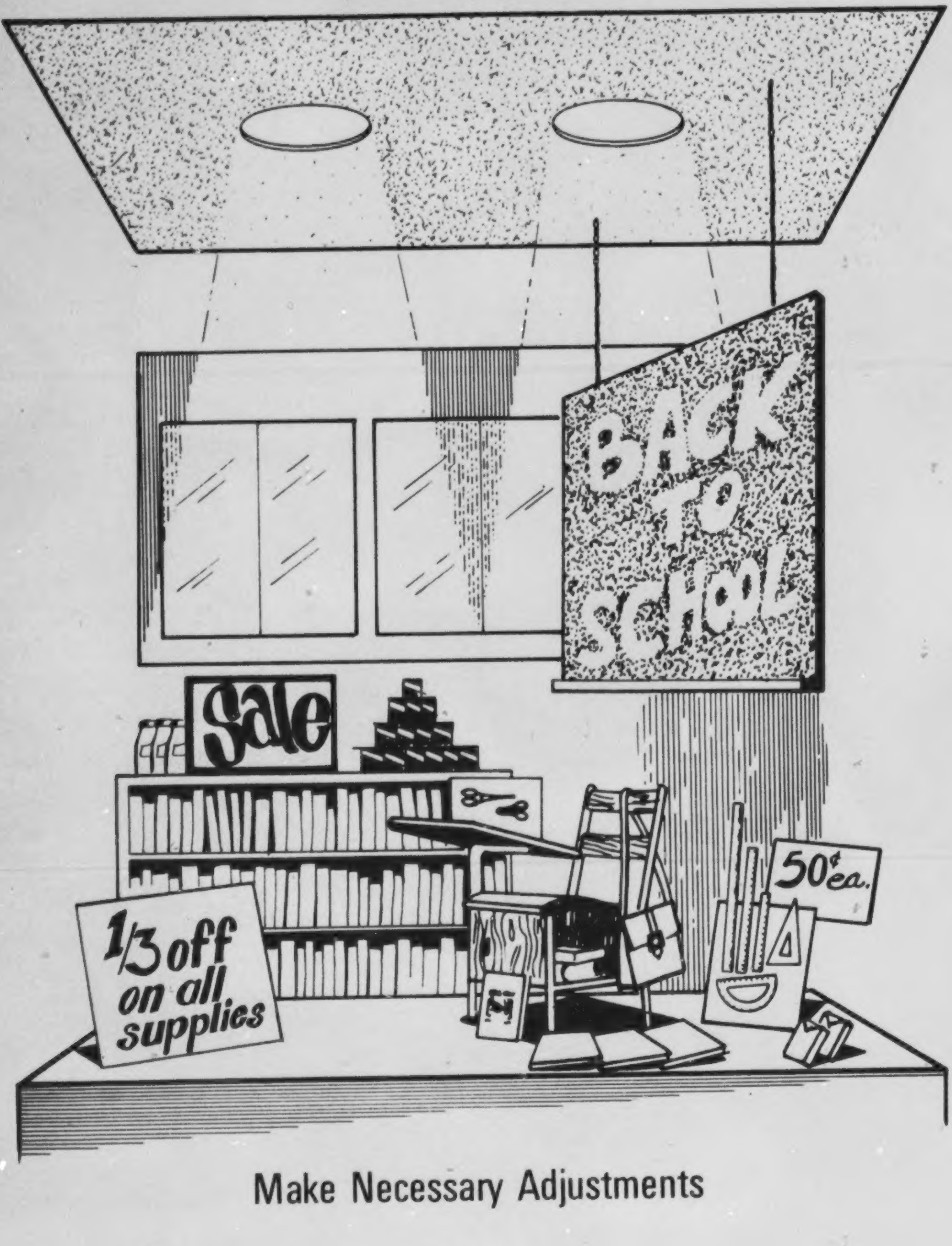
Merchandise


BACK TO SCHOOL
Sale

Placing Show Cards in the Display

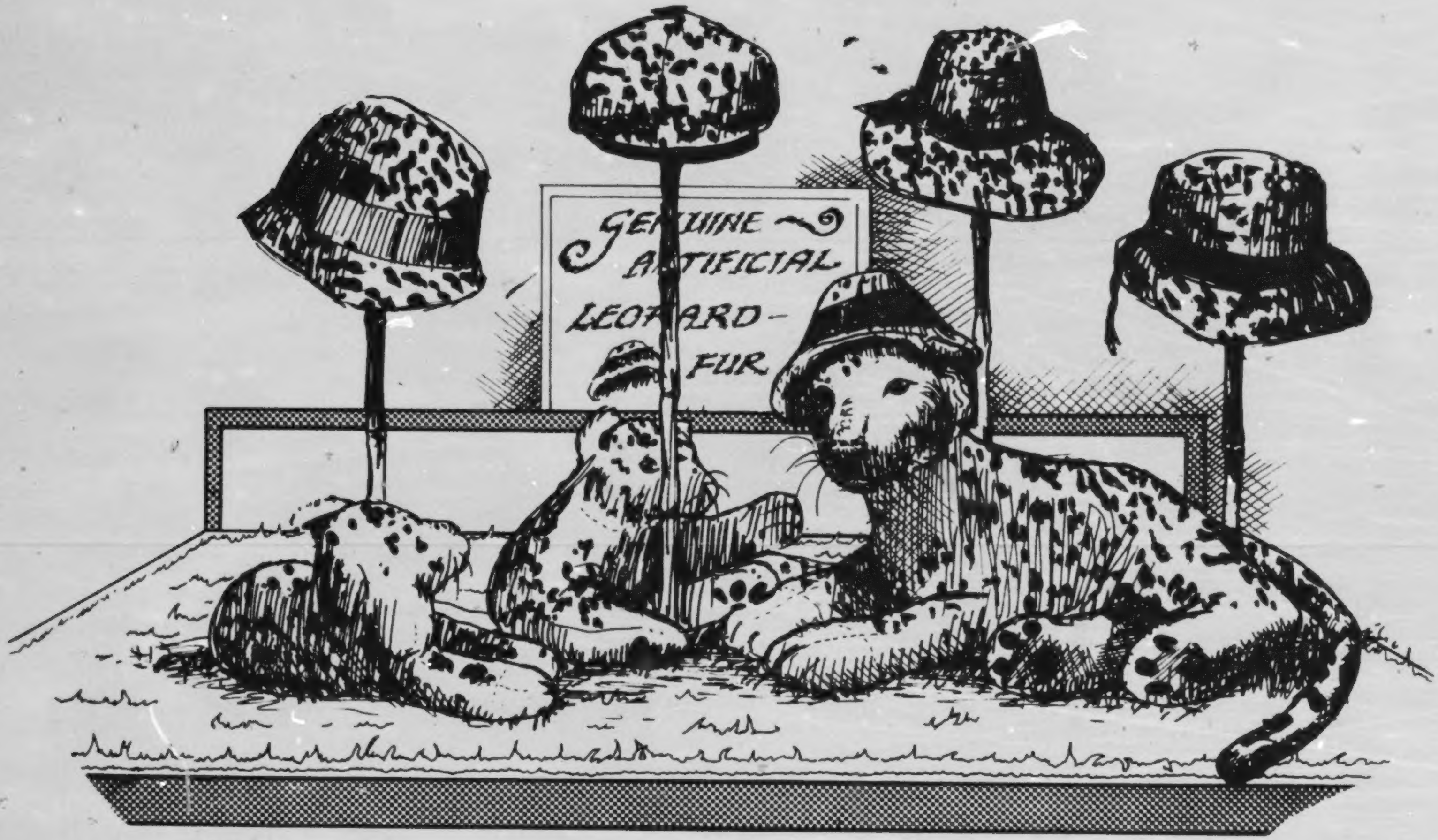

BACK TO SCHOOL
Sale
1/3 off on all supplies
50¢ ea.

Evaluation

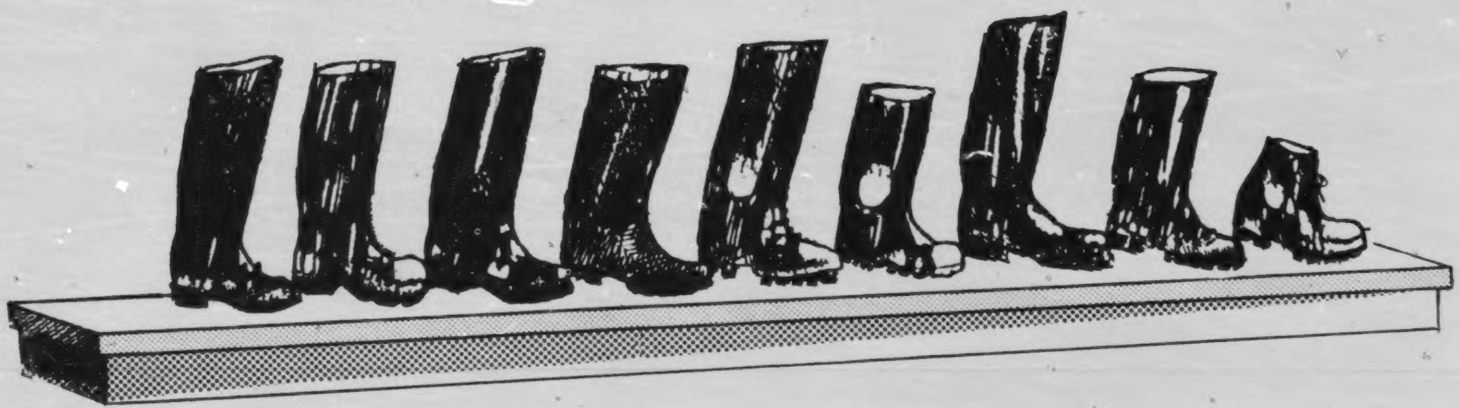

BACK TO SCHOOL
Sale
50¢ ea.
1/3 off on all supplies

Make Necessary Adjustments

Harmony


GENUINE ARTIFICIAL LEOPARD-FUR

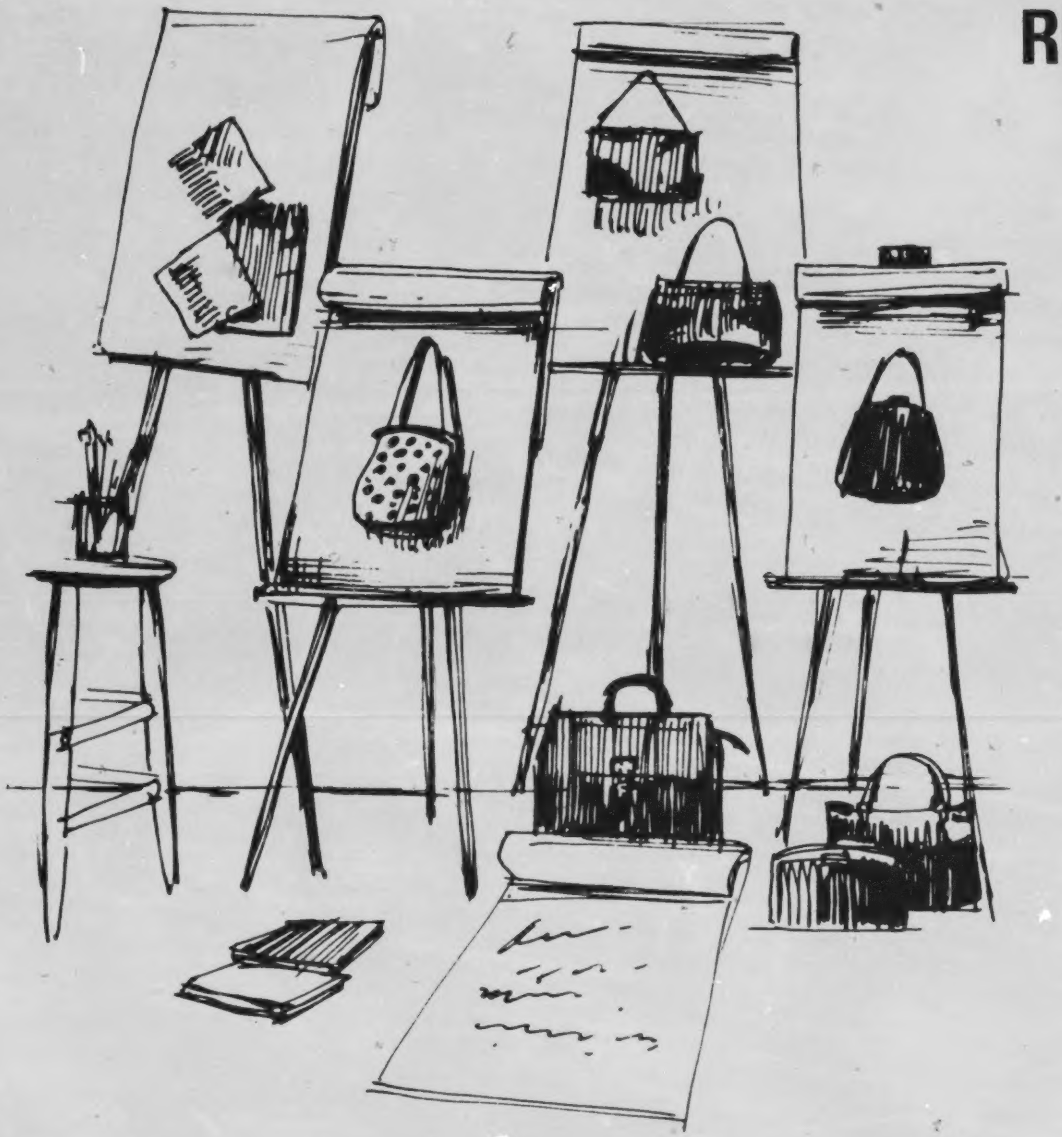
Repetition



TM 28

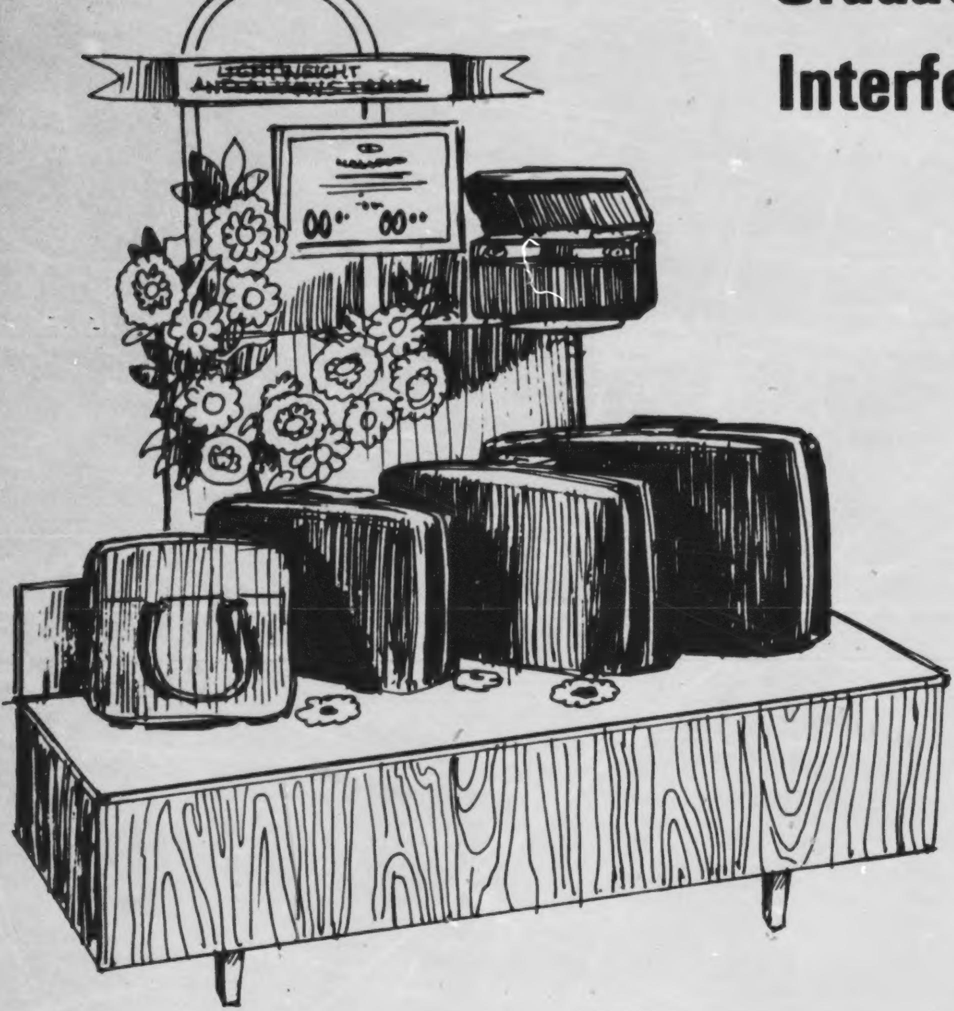
DE II · 75·E

Rhythm



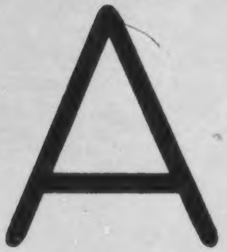
Contrast

Gradation - Interference

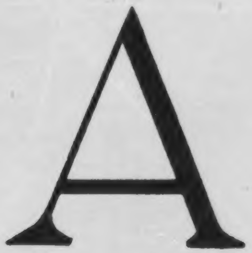

LIGHTWEIGHT

Basic Letter Styles

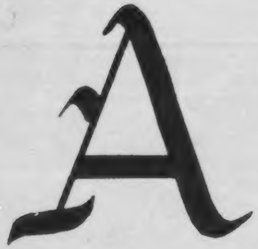
Gothic: Strokes Equal Width



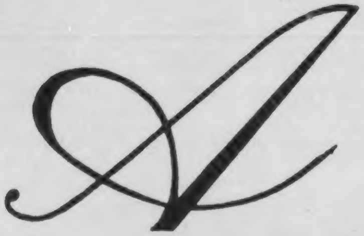
Roman: Thick and Thin Strokes



Text: Ornamental Pen-Drawn Strokes



Script: Slanted letters Connected



DISPLAY
UNIT I

ASSIGNMENT SHEET #1--THEME IDEAS

From the following information decide on three theme ideas that could be used in each window display.

1. Display of summer swimwear (bright colors)

   Theme ideas

   a.

   b.

   c.

2. Display of new winter coats (dark winter colors)

   Theme ideas

   a.

   b.

   c.

3. Display of spring shipment of shoes

   Theme ideas

   a.

   b.

   c.

4. Display of French pastry featured in the bake shop

   Theme ideas

   a.

   b.

   c.

DISPLAY
UNIT I

ASSIGNMENT SHEET #2--PROP SURVEY

Make a list of items at your home that could be used as functional and decorative props in future displays, for example, clothes hangers, boxes, lamps, coffee pot, figurines, antique furniture, or suitcases. Items may be found among things located in the attic, backyard, garage, or other places.

1.

2

3.

4.

5.

6.

7.

8.

9.

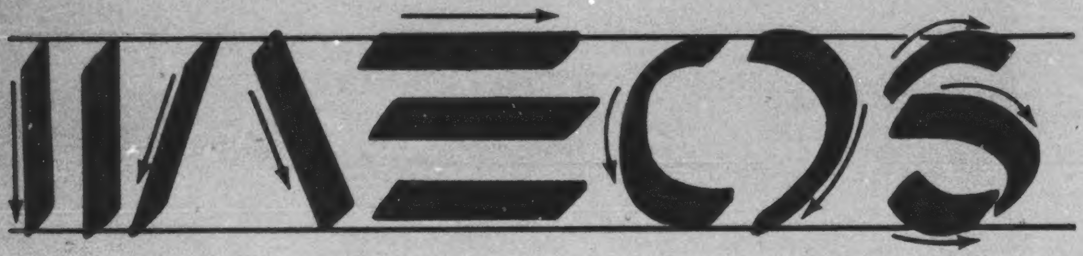
10.

DISPLAY
UNIT I

ASSIGNMENT SHEET #3--LETTERING LINES

Show cards may be lettered using a sign press machine, transfer letters, or stencils. However, many times a person will need to letter a show card by hand. Practice making the lines shown below using a felt-tipped pen or magic marker. Holding the pen at a 45° angle, use long, even strokes to form each line.

(NOTE: All letters are formed from straight, curved, or slanted lines. Any letter or number can be made by combining these lines.)



DISPLAY
UNIT I

ASSIGNMENT SHEET #4--LETTERING ALPHABET

Practice making the letters below using a felt-tipped pen.

ABCDEFGHIJKL

MNOPQRSTUJ

VW& 2345 6789¢ ?XYZ

abcdefghijklmn

92-E

ASSIGNMENT SHEET #4

opqrstuvwxyz

and with the serif added —

abcdefghijlmn

opqrsutvwxyz

same lowercase with pen tip at 45° angle /

abcdefghijklmno

pqrstuvwxyzf&

now shift pen back again —

ABCDEGHJKLN

MQRSTUWXYZ

DISPLAY
UNIT I

ASSIGNMENT SHEET #5--THUMBNAIL SKETCH OF A SHOW CARD

1. Using the copy below, design, lay out, and letter a show card. Use attractive margins and lettering.

   (NOTE: If the teacher-coordinator prefers, this assignment may be done on 8 x 10 inch posterboard.)

   Sale! Early American rocker, antique white and maple, $92

2. Make a thumbnail sketch of a show card for a product in your business or for a display you are building as a class project.

3. Use copies of the checklist on the next page to evaluate the show cards.

DISPLAY
UNIT I

CHECKLIST FOR EVALUATING SHOW CARDS

Use the following checklist to help judge if the written copy and layout of the show cards are acceptable.

EVALUATION ITEMS		YES	NO
1.	Are all words spelled correctly?		
2.	Does the lead-in line give a reason for buying, suggested use, or major buying benefit?		
3.	Are the words descriptive?		
4.	Does the headline identify the merchandise by name, trade-mark, or brand name?		
5.	Are the words and letters neatly spaced?		
6.	Do the selling features point out the product features that are NOT obvious to the customer at first glance?		
7.	Do the selling features answer questions the customer would want to know about the product?		
8.	Is the price correctly written?		
9.	Is the copy brief and to the point?		
10.	Does the sign remind the prospective buyer of something wanted or needed?		
11.	Is the copy short, not too many words?		
12.	Is the amount of copy balanced with the size of the sign?		
13.	Is the spelling correct?		
14.	Is the copy information understandable?		
15.	Does the copy describe the products truthfully?		
16.	Are the number of lines appropriate for the size of the sign?		
17.	Is the sign clean?		

DISPLAY
UNIT I

JOB SHEET #1--DRESS A MANNEQUIN

I. Equipment

A. Mannequin

B. Clothes and accessories

II. Procedure

A. Clean the mannequin stand

B. Wash your hands

(NOTE: Merchandise and props are expensive items and may be damaged by soiled hands.)

C. Select appropriate style and size of mannequin

(NOTE: It is usually not a good idea to interchange parts of mannequins.)

D. Remove wig or cover the head with a plastic bag if the wig is permanently attached

(NOTE: This should be done also when undressing and storing mannequins not in use.)

E. Remove the hands and arms

(NOTE: The hands should be removed first if they are not permanently attached. Place the disassembled parts where they will not be in danger of falling or being stepped on. Develop a system so you can remember the left-sided parts from the right-sided parts. Never try to dress or move a fully assembled mannequin.)

F. Remove the top half and/or removable legs of the mannequin if helpful in dressing

(NOTE: Turn bottom half of mannequin upside down when dressing mannequin in pants.)

G. Place clothing on the torso of the mannequin

H. Place mannequin arms through sleeves

(NOTE: Care should be taken not to damage the mannequin with zippers, hooks, or ornaments.)

JOB SHEET #1

I. Attach arms and hands securely

(NOTE: Arms should be attached first if they are not permanently attached. Clothing should be held so it will not get caught in the sockets.)

J. Button clothes

K. Fold and pin clothing so that it fits properly

(NOTE: Caution must be taken not to damage or wrinkle the fabric. Pins, folds, and tucks should not be visible to the customers.)

L. Replace wig or remove plastic bag

M. Conceal unwanted tags and bags

(NOTE: Tags may be put inside sleeves, tucked in the back of belts, or placed under the mannequin stand or behind other props.)

DISPLAY
UNIT I

JOB SHEET #2--MAKE A TRAY-CUT CASE

I. Equipment

   A. Box cutter

   B. Uncut cardboard box

II. Procedure

   A. Turn case upside down

   B. Cut the actual bottom side of the case several inches from the bottom

   (NOTE: When cutting remember to cut away from yourself, not to play around with sharp cutting tools, and to keep sharp objects out of the reach of children.)

   C. Remove the bottom of the case

   D. Mark the prices on that half of the carton

   E. Replace the bottom

   F. Turn the case right side up

   G. Remove the top half of the carton

   H. Price the top layer of merchandise

   I. Leave the top half off for an effective display

DISPLAY
UNIT I

TEST

1. Match the terms on the right to the correct definitions by placing the appropriate numbers in the blanks provided. Terms and definitions are continued on the following page.

______a. Display used to show merchandise near related items, at the ends of aisles, and near the check-out counter

______b. Display where the merchandise is protected from handling, dust, danger, or theft

______c. Display used to show merchandise so that the customer may touch it

______d. Fixture used to build a display

______e. Display used primarily to build customer goodwill

______f. Display which attempts mainly to sell specific merchandise

______g. Impersonal selling through display

______h. Emphasis given to an idea or item of merchandise to attract the customer's attention

______i. Elements of a display not spaced the same on both sides but which appear balanced by varying the distance of larger, heavier elements, various shapes, and colors

______j. Elements spaced evenly on both sides of a display

______k. Point a little above the actual measured center

______l. Spot within a rectangle where the eye naturally pauses

1. Dominance
2. Informal balance
3. Focal point
4. Receding colors
5. Optical center
6. Formal balance
7. Advancing colors
8. Color wheel
9. Free form display
10. Suspension display
11. Thumbnail sketches
12. Visual merchandising
13. Show cards
14. Promotional display

_____m. Colors that create the illusion of space by making objects look smaller or farther away

_____n. Colors that may appear to come forward or make objects look larger

_____o. Colors of the spectrum arranged in a circle and used to plan combinations of colors

_____p. Display in which merchandise is hung in mid-air by thin wire or string

_____q. Display in which color and design take preference over realism

_____r. Small, quick sketches that give an idea of how the finished display or show card will look

_____s. Arrangements of letters and numbers on a show card

_____t. Words and printed material on a show card

_____u. Signs used in displays to give information about the featured merchandise

15. Layout
16. Institutional display
17. Copy
18. Prop
19. Closed display
20. Point-of-purchase display
21. Open display

2. Select from the following list the purposes of displays. Place an "X" in the correct blanks.

_____a. To sell merchandise and ideas

_____b. To bring customers into the store

_____c. To build an image of a prestige store or a bargain store

_____d. To maintain goodwill

_____e. To suggest combinations of merchandise

_____f. To introduce new items and uses for products

_____g. To create a pleasing shopping environment

_____h. To remind customers of items they may have forgotten or desired after exposure to advertising messages

3. Match time and structural design classifications on the right to descriptions of each. Place the correct numbers in the blanks provided.

______a. Windows that are angled toward the store entrance and tend to lead customers into the store

______b. Display that shows bargains in items that can be used the remainder of the season

______c. Display area resembling a shallow box open on one side

______d. Display that shows seasonal merchandise before the season begins

______e. Display area set off from the rest of the store

______f. Display that shows best selling items

______g. Display that shows gifts for special occasions, such as holidays

______h. Items attached to interior walls

______i. Window which may be viewed from several directions

______j. Display above shelves and racks which gives the store a total look

1. Wall display
2. Corner window display
3. Ledge display
4. End-of-season display
5. Lobby window display
6. Runner display
7. Island display
8. Preseason display
9. Shadow box display
10. Special event display

4. Arrange in order the steps in creating a display. Place a "1" in front of the first step, a "2" by the second step, and so on. (Continued on the next page.)

______a. Make necessary adjustme[illegible]

______b. Place show cards

______c. Set up large props

______d. Clean the display area

______e. Select the merchandise and props

______f. Plan the window

______g. Add decorative props

_____h. Place prices on merchandise

_____i. Place the merchandise and accessories in the display

_____j. Remove merchandise and fixtures from old display

5. Match the basic design principles on the right to descriptions of each. Place the correct numbers in the blanks provided.

_____a. Overlapping items to create a feeling of relatedness between items

_____b. Combining opposites

_____c. Repeating features at regular intervals or patterns

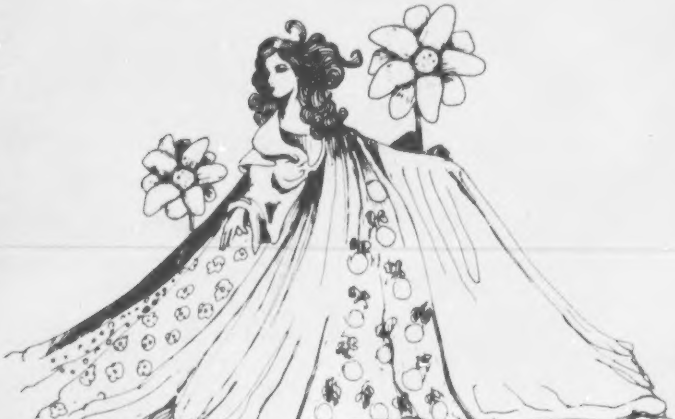
_____d. Arranging similar items at the same angle and with the same distance between each item

_____e. Connecting points of the display by a series of steps from light to dark or from small to large

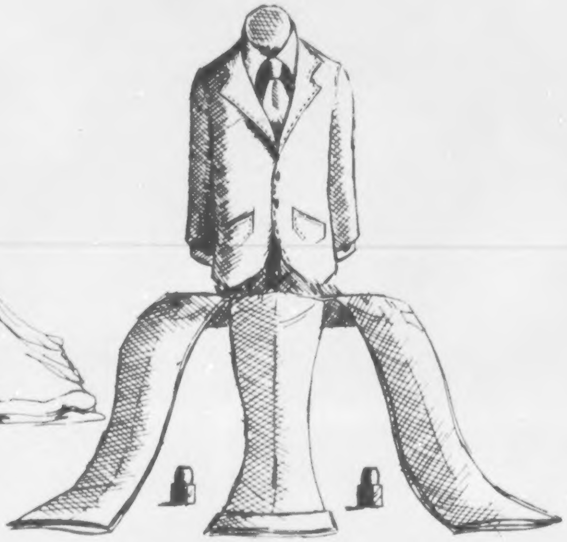
_____f. Combining items to create a unified effect

1. Gradation
2. Contrast
3. Rhythm
4. Harmony
5. Interference
6. Repetition

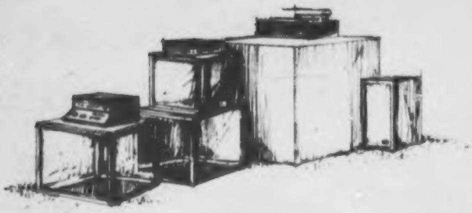
6. Identify each of the following basic display arrangements by writing the correct names in the blanks provided.



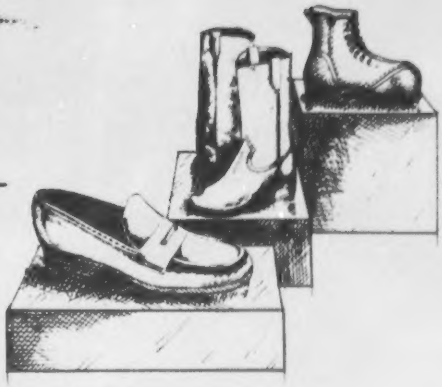
a. ______________________



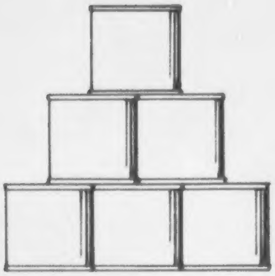
b. ______________________



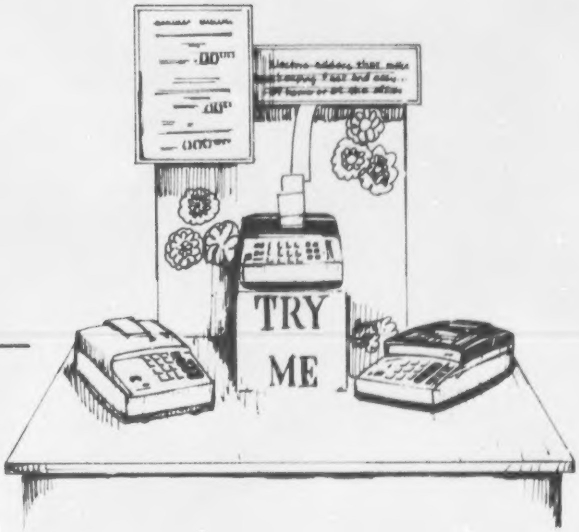
c. ____________________



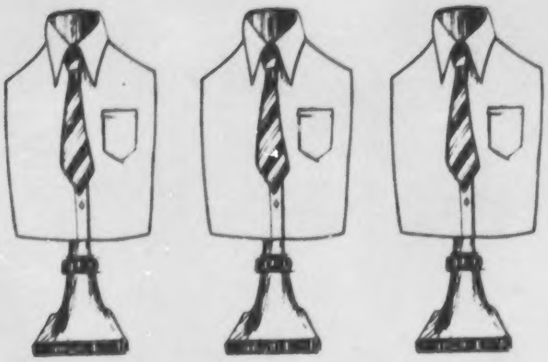
d. ____________________



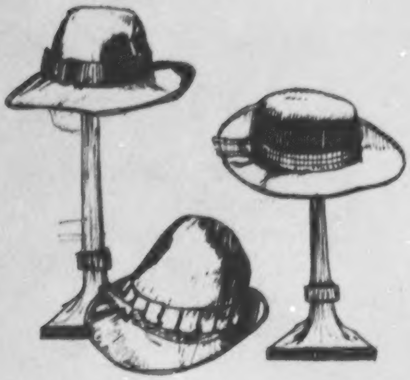
e. ____________________



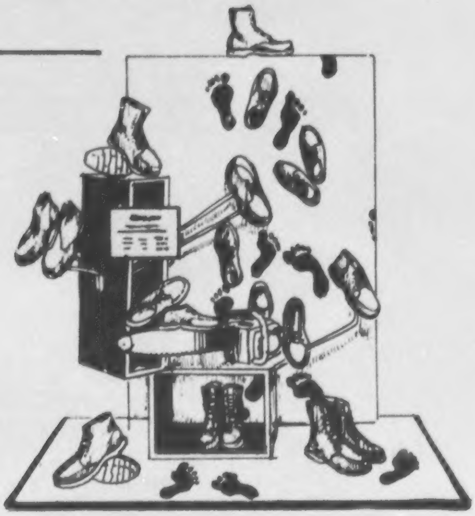
f. ____________________



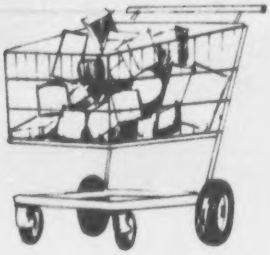
h. ______________________________

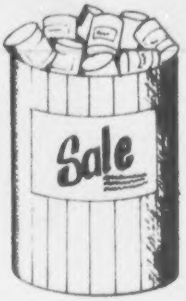


g. ______________________________



i. ______________________________





j. ______________________________

k. ______________________________

7. Describe the impression given by the number of items in a display.

a.

b.

8. Select from the following list true statements about the uses of color in displays. Place an "X" in the correct blanks.

_____a. Use colored lights on merchandise to give a truthful presentation of the merchandise

_____b. Use of many different colors in a display is highly recommended

_____c. Avoid placing in direct sunlight any items with colors that will fade

_____d. Be aware of the psychology of colors for backgrounds and merchandise

9. Select from the following list true statements about lighting techniques. Place an "X" in the correct blanks.

_____a. Emphasize the background with bright lights

_____b. Have the brightest light on the dominant part of the display

_____c. Avoid glare

_____d. Avoid shadows unless they are used for special effects

_____e. Avoid lighting which would not show true color of merchandise

_____f. Hide lighting fixtures from view

_____g. Work with lighting at night to discover its full effect

10. Select from the following list true statements about handling customer's request for merchandise on display. Place an "X" in the correct blanks.

_____a. Know what merchandise from your department is on display

_____b. Know where the merchandise is displayed

_____c. Check to see if requested merchandise is in stock before removing merchandise from a display

_____d. Know the store's policy concerning displayed merchandise

_____e. Under the immediate sale policy, replace merchandise which has been sold when time permits ______f. Under the delayed sale policy, the customer is told to come back later and see if the merchandise is still available when the display is removed

______g. Under the delayed sale policy, mark the merchandise according to store policy so it will only be sold once

11. Select from the following list true statements about the placement of interior displays.

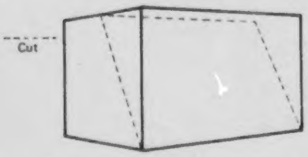
______a. Interior displays should be placed to the left of doors

______b. Interior displays are effective at the ends of aisles

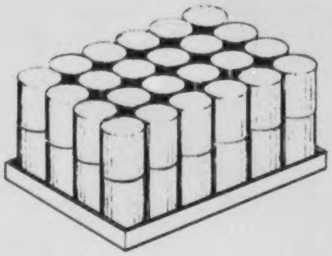
______c. Interior displays may be placed on ledges

______d. Interior displays should be placed above eye level

12. Identify the types of displays made from stacking boxes by placing the name of each in the blanks provided.

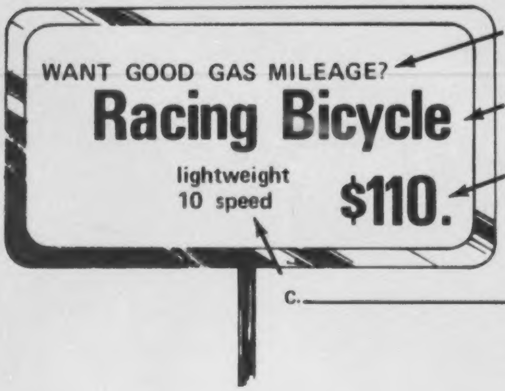


a.______________________



b.______________________

13. Identify the parts of the show card illustrated below by placing the names in the blanks provided.



a.______________________

b.______________________

d.______________________

c.______________________

14. List two purposes of signs or show cards.

a.

b.

15. Select from the following list factors to be considered in planning show card layouts.

_____a. Draw thumbnail sketches beforehand

_____b. Use generous margins on the card

_____c. Balance the layout

_____d. Write good copy

_____e. Make the copy appeal to general audiences

_____f. Use lettering style appropriate for the product

_____g. Get as much information as possible on the show card

_____h. Decide what features or benefits should be emphasized

_____i. Make clear, legible letters

_____j. Space letters evenly with one or more full spaces between words

_____k. Use larger letters for more important copy

16. Demonstrate the ability to:

a. Dress a mannequin.

b. Make a tray-cut case.

(NOTE: If the above activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

DISPLAY
UNIT I

ANSWERS TO TEST

1.	a.	20	h.	1	o.	8
	b.	19	i.	2	p.	10
	c.	21	j.	6	q.	9
	d.	18	k.	5	r.	11
	e.	16	l.	3	s.	15
	f.	14	m.	4	t.	17
	g.	12	n.	7	u.	13
2.	a, b, c, d, e, f, g, h					
3.	a.	5	e.	7	i.	2
	b.	4	f.	6	j.	3
	c.	9	g.	10		
	d.	8	h.	1		
4.	a.	10	f.	1		
	b.	8	g.	7		
	c.	5	h.	9		
	d.	3	i.	6		
	e.	4	j.	2		
5.	a.	5				
	b.	2				
	c.	3				
	d.	6				
	e.	1				
	f.	4				

6. a. Radiation
    b. Radiation
    c. Stair-step
    d. Stair-step
    e. Pyramid
    f. Pyramid
    g. Zig-zag
    h. Repetition
    i. Mass
    j. Dump
    k. Dump

7. Description should include:
    a. Large number of items gives the feeling of bargains
    b. Single item or a small number of items and accessories gives a feeling of prestige and exclusiveness

8. c, d

9. b, c, d, e, f, g

10. a, b, c, d, e, g

11. b, c

12. a. Window-cut case
    b. Tray-cut case

13. a. Lead line
    b. Headline
    c. Selling features and benefits
    d. Price line

14. Any two of the following:
    - a. To identify the product or idea
    - b. To show costs, manufacturer, uses, and/or benefits
    - c. To entice customers to buy
    - d. To give directions to location of merchandise in the store

15. a, b, c, d, f, h, i, j, k

16. Performance skills evaluated to the satisfaction of the instructor

ADVERTISING MEDIA
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to select appropriate advertising media. This will be done in part by selecting from a list the goals of advertising and the kinds of merchandise to advertise. The student should be able to name the factors which determine when to advertise and list the advantages and disadvantages of major kinds of media. This knowledge will be evidenced by a score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with advertising media to their definitions.
2. Select from a list the goals of advertising.
3. Select from a list the kinds of merchandise to advertise.
4. Name the factors which determine when to advertise.
5. List advantages and disadvantages of the following major advertising media: newspaper, magazine, direct mail, radio, and television.
6. Select from a list true statements about other forms of advertising media.

ADVERTISING MEDIA
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

  A. Give pretest using objective sheet.

  B. Order films.

  C. Provide student with objective sheet.

  D. Provide student with information and assignment sheets.

  E. Make transparencies.

  F. Discuss unit and specific objectives.

  G. Discuss information and assignment sheets.

  H. Arrange for field trips to and/or guest speakers from the following: advertising agency, advertising department of a large store, newspaper office, radio station, television station, and/or outdoor advertising agency.

  I. Provide examples of all the kinds of advertising mentioned in the unit.

  J. Provide periodicals for students to find examples of the kinds of advertising mentioned in the unit.

  K. Provide local advertising rate cards and figure the costs of advertising.

  L. Teach basic math if necessary.

  M. Give test.

  N. Reteach if necessary.

  O. Test again until minimum standard is reached.

II. Student:

  A. Read objective sheet.

  B. Study information sheet.

  C. Take notes.

D. Complete assignment sheets.

E. Attend field trips and other activities.

F. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

- A. Objective sheet
- B. Information sheet
- C. Transparency masters
  1. TM 1--Promotional Advertising
  2. TM 2--Institutional Advertising
  3. TM 3--National Advertising
  4. TM 4--Shopping News
  5. TM 5--Car-Card Advertising
  6. TM 6--Catalogs
  7. TM 7--Table Tent
- D. Assignment sheets
  1. Assignment Sheet #1--Promotional and Institutional Advertising
  2. Assignment Sheet #2--Figuring Advertising Costs with Rate Cards
- E. Answers to assignment sheets
- F. Test
- G. Answers to test

II. References:

A. Nolan, Carroll A., and Warmke, Roman F. *Marketing, Sales Promotion, and Advertising.* 7th ed. Dallas: South-Western Publishing Co., 1965.

B. Ocko, Judy Young. *Retail Advertising Copy: The How, The What, The Why.* New York: National Retail Merchants Association, 1975.

C. Nelson, Roy Paul. *The Design of Advertising.* Dubuque, Iowa: William C. Brown Co., 1972.

D. Samson, Harland E. *Advertising and Displaying Merchandise.* Dallas: South-Western Publishing Co., 1967.

E. Richert, Henry G.; Meyer, Warren G.; Haines, Peter G.; and Harris, Edward G. *Retailing Principles and Practices.* 6th ed. Dallas: Gregg Division/McGraw Hill Co., 1974.

III. Film--"Stalking the Wild Cranberry: Making of a TV Commercial." Available from ACI Films Inc.; P.O. Box 1898; 12 Jules Lane; New Brunswick, New Jersey 08902.

(NOTE: Only Oklahoma teachers may order films from the State Department of Vocational and Technical Education, Curriculum and Instructional Materials Center, 1515 West Sixth Avenue, Stillwater, Oklahoma 74074. Out-of-state teachers may purchase and/or rent materials from the address listed.)

ADVERTISING MEDIA
UNIT I

INFORMATION SHEET

I. Terms and definitions

A. Advertising--Public announcement which is paid for and has an identified sponsor

(NOTE: Display advertising generally refers to ads which include illustrations.)

B. Publicity--Presentation of facts which may be free and may not have an identified sponsor

Example: Newspaper article to gain attention about a new store opening or employee's promotion

C. Promotional advertising--Advertising which mainly attempts to sell specific merchandise (Transparency 1, Assignment Sheet #1)

D. Institutional advertising--Advertising used primarily to build customer goodwill and to present the store as a good place to shop (Transparency 2, Assignment Sheet #1)

(NOTE: This is done by emphasizing the store's prestige or service. Institutional advertising also includes public service advertisements, such as a National DECA Month advertisement.)

E. National advertising--Advertising done on a nationwide level by manufacturers or suppliers (Transparency 3)

F. Cooperative advertising--Advertising in which the cost is shared by the local business and the manufacturer or supplier

G. Local advertising--Advertising done by local businesses

H. Media--Various methods of giving out information

(NOTE: "Medium" is the singular of "media.")

I. Advertising rate card--Card containing information about costs and restrictions (Assignment Sheet #2)

J. Leader--Merchandise sold at a reduced price or even at a loss in order to attract customers into the store

(NOTE: If merchandise is sold at a loss it is known as a loss leader.)

INFORMATION SHEET

K. Classified ad--Advertising grouped in a special section of a newspaper and containing mostly copy with very few illustrations

(NOTE: This is sometimes called display advertising if the ad does contain any illustrations or unusual type.)

L. Milline rate--Cost of a single line of newspaper space per each million people reached by the newspaper circulation

M. Column inch--Method of measuring and paying for some newspaper ads

(NOTE: A column inch is one inch deep by one column in width.)

N. R.O.P. (Run of paper)--Advertisement that may be placed anywhere in the newspaper as opposed to specifying a particular section of the newspaper or position of the ad on the page

(NOTE: It is usually less expensive to advertise R.O.P. than to guarantee position.)

O. Mailing list--List of prospective customers

(NOTE: A business may compile its own list or purchase a list compiled by mailing list companies. This list may be categorized by factors such as age, sex, and occupation.)

P. Network--National organization which links television and radio stations together

Examples: ABC, NBC, CBS

Q. Spot announcement--Radio or television commercial that ranges from 10 to 60 seconds in length; usually purchased as a package of 10, 20, or 30 advertisements

(NOTE: Radio announcements use repetition to get the message across to prospective customers.)

R. Prime time--Time when the largest number of people listen to the radio or watch television and, thus, the time when it is most expensive to advertise

(NOTE: The size of the broadcast area will also affect the cost.)

S. Advertising agency--Business which conducts market research and plans and executes advertising campaigns for firms and companies

T. Advertising budget--Estimate of the amount of money to be spent on advertising during the year; usually based upon a percentage of last year's sales

INFORMATION SHEET

II. Goals of advertising

A. To sell specific goods, services, ideas, or companies

(NOTE: An advertiser needs good product information and a knowledge of selling and customer's buying motives.)

B. To bring customers into the store

C. To maintain goodwill

D. To balance sales volume during a week or month when sales are lower

Example: January white sale

E. To attract new customers

F. To introduce new ideas, products, or services

Example: Advertisement about acquiring additional parking space

III. Kinds of merchandise to advertise

(NOTE: Care should be taken to have an adequate stock to cover anticipated sales.)

A. Best sellers

(NOTE: This is determined by sales records, salespeople, buyers, and what competitors are doing.)

B. New items and styles

C. Reduced items

D. Timely merchandise

Example: Candy for Valentine's Day

IV. When to advertise

(NOTE: Salespersons should be aware of when ads appear so they may be mentioned during the selling process and so the displays may be coordinated with the ads.)

A. Heavy promotional periods

Examples: Back-to-school promotions, anniversary sales, Christmas, end-of-season clearance

INFORMATION SHEET

B. Day of the week that is best for the type of store, product, and customers

Examples: Wednesday and Thursday for weekend grocery shopping; Sunday when people may have more time to read the newspaper

V. Major advertising media

(NOTE: The most effective sales promotion is one in which a local business coordinates its advertising with the promotions done by manufacturers and suppliers. It is also important to remember that it is advertising which pays for television, radio, newspapers, and magazines.)

A. Newspaper

1. Advantages

a. Is widely read

b. Is relatively inexpensive

c. Can be changed relatively quickly

2. Disadvantage--Has a short reading life

(NOTE: A newspaper does not usually lay around long.)

B. Magazine

1. Advantages

a. Adds prestige to a product or business

b. Can get effective use of color

c. Has a long reading life

d. May reach a select audience

Examples: *Progressive Grocer,*
American Vocational Association Journal,
different ads for different parts of
the country in the same magazine

e. Is a good medium for educating consumers about a product or service

INFORMATION SHEET

2. Disadvantages
    a. Is relatively expensive
    b. May waste circulation unless business's trading area is quite large
    c. Is not easy to change on short notice

C. Direct mail
  1. Advantages
    a. Has direct and personal appeal to one group
    b. May be used to make immediate sales by enclosing an order blank
    c. Is relatively inexpensive if special postal rates can be obtained
  2. Disadvantages
    a. Requires that the mailing list be constantly revised
    b. May be ignored by some people as merely "junk" mail

D. Radio
  1. Advantages
    a. Suited for products of general demand because of large diversified audience
    b. Can be changed relatively easily
    c. Can be repeated frequently
    d. Is relatively inexpensive
  2. Disadvantages
    a. May waste coverage on many people who are not potential customers
    b. Is not suited for products that must be seen to develop customer interest

INFORMATION SHEET

E. Television

   1. Advantages

      a. Has a large diversified audience

      b. Is good for national advertising

      c. Adds prestige to a product or business

      d. Is easy to show demonstration of a product

   2. Disadvantage--Is expensive

VI. Other forms of advertising media

A. Shopping news--Newspaper consisting mainly of advertisements and usually distributed free of charge (Transparency 4)

(NOTE: They may be picked up in local businesses, mailed, or placed inside the regular newspaper.)

B. Car-card advertising--Advertising placed in busses, on taxis, in airports, and on the sides of automobiles (Transparency 5)

C. Outdoor advertising--Billboards, posters, painted walls, and electrical signs

D. Directory advertising--Ad placed in the yellow pages of telephone directories covering the shopping areas

E. Program advertising--Advertising which is done mainly as a public service or charity since few sales are generated by this type of advertising

Examples: Yearbook, concert program

F. Specialty advertising--Free item with the business's name on it; given to create goodwill, gain the customer's attention, and keep the business's name in the customers' minds

Examples: Ink pens, calendars

G. Catalog--Publication printed on a regular basis by mail order companies or on special occasions for a particular store or company (Transparency 6)

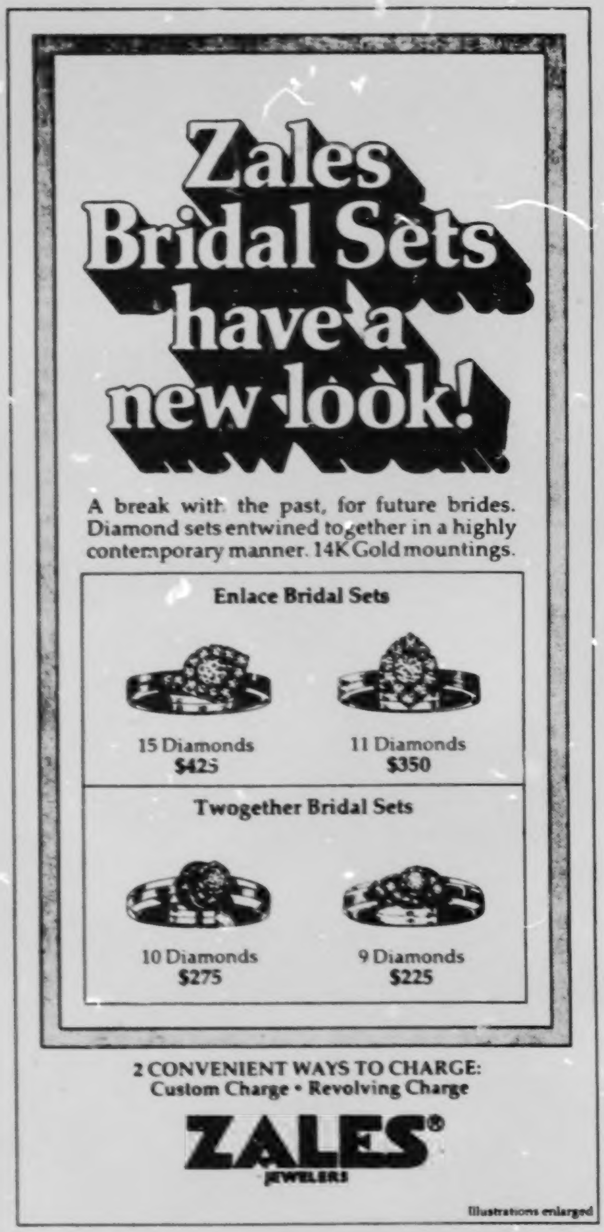
Examples: Ward's, Penney's, Sear's, Neiman Marcus Christmas catalog

INFORMATION SHEET

H. Handbill--Advertisement distributed door to door, placed on parked cars, or placed in sacks to announce grand openings and special promotions

I. Table tent--Stand-up card placed on tables in restaurants (Transparency 7)

Promotional Advertising



Zales Bridal Sets have a new look!

A break with the past, for future brides. Diamond sets entwined together in a highly contemporary manner. 14K Gold mountings.

Enlace Bridal Sets

15 Diamonds
$425

11 Diamonds
$350

Twogether Bridal Sets

10 Diamonds
$275

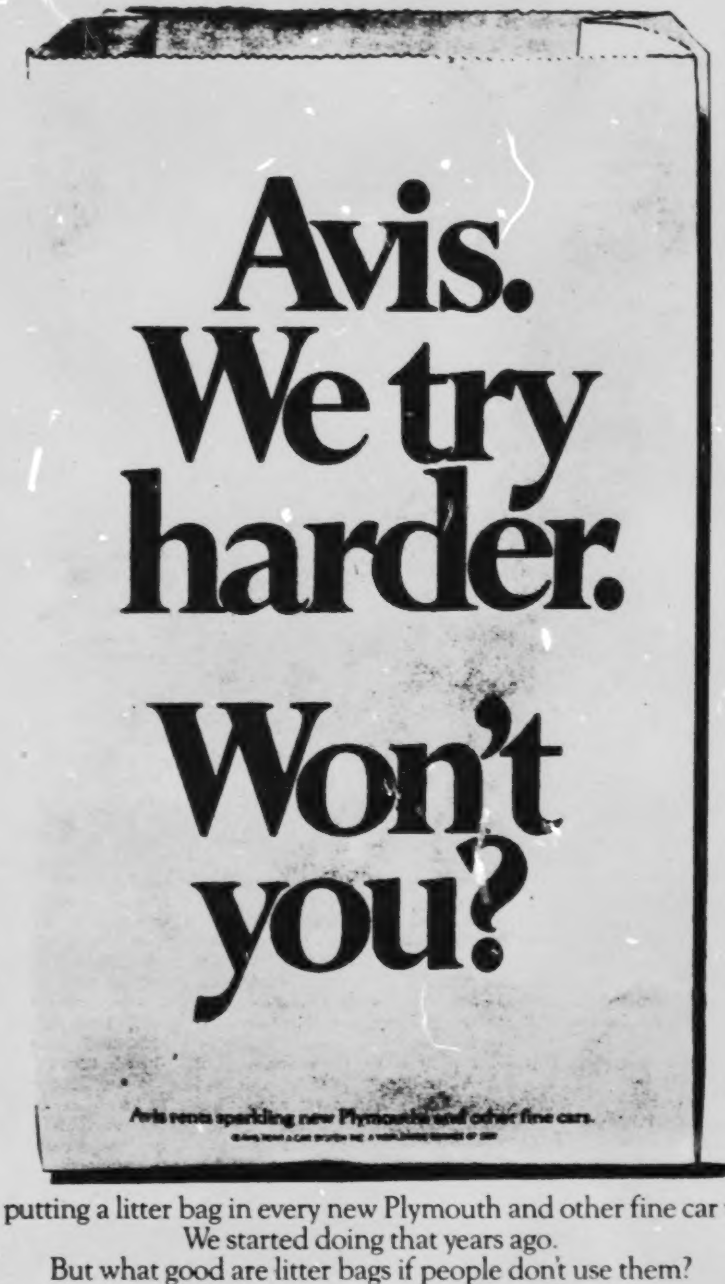
9 Diamonds
$225

2 CONVENIENT WAYS TO CHARGE:
Custom Charge • Revolving Charge

ZALES®
JEWELERS

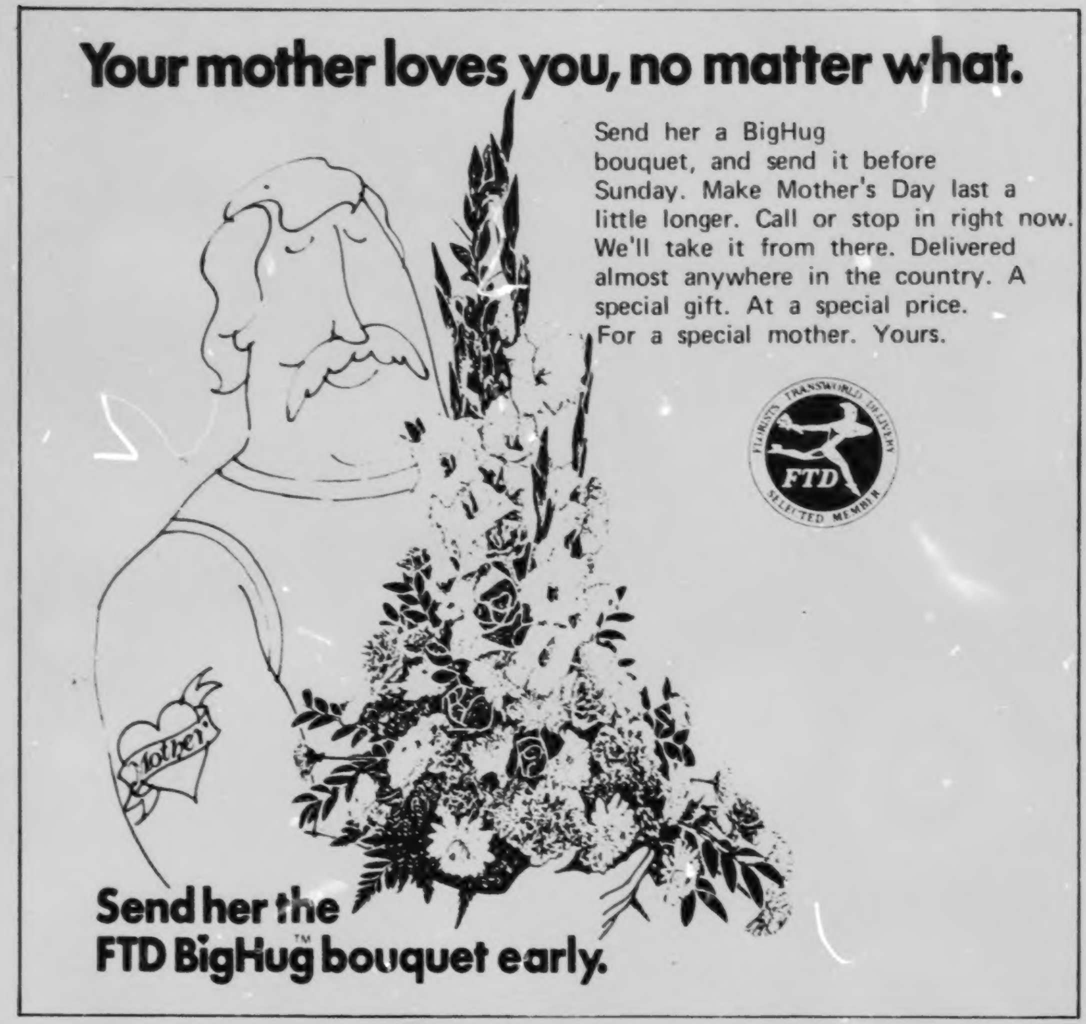
Illustrations enlarged

Institutional Advertising


Avis.
We try
harder.
Won't
you?
Avis rents sparkling new Plymouths and other fine cars.

Avis is putting a litter bag in every new Plymouth and other fine car we rent.
We started doing that years ago.
But what good are litter bags if people don't use them?
Won't you please try harder, too?

National Advertising



Your mother loves you, no matter what.

Send her a BigHug bouquet, and send it before Sunday. Make Mother's Day last a little longer. Call or stop in right now. We'll take it from there. Delivered almost anywhere in the country. A special gift. At a special price. For a special mother. Yours.

Send her the FTD BigHug™ bouquet early.

Mother
FLORISTS TRANSWORLD DELIVERY
FTD
SELECTED MEMBER

Shopping News

FREE!
At more than 300 locations.

6th Year of Service

Shop 'n Swap

"The Advertising Paper"

JAN. 21-27

Volume 6, No. 10

STILLWATER — OSU CAMPUS — PERRY — MORRISON — PAWNEE — GLENCOE — PERKINS — RIPLEY — YALE

HOUSEHOLD GOODS

ASHLEY WOOD HEATER, large size with thermo stat. 918-757-2283 t-

WATERBED!! King size pine frame and liner. $45. Call 372-6715 after 5 30 t-

FOR SALE: Used ref. and freezers. 90 day guaranteed. Star Service Co. 372-2186 bcv

VOTE FOR JANET CUNNINGHAM. We need better communication between parents & schools. Tues. Jan. 27 t

24,000 BTU AIR CONDITIONER. 2 mos. old. $360. 918-372-4225 t

FOR SALE: Used electric stove, deel well cooker, plenty of storage space, and in good condition. $20 or best offer. Call 624-1604 t

ODDS & ENDS

STRUCTURED PIPE AND STEEL angle channel beans, plate, rods and cable. 918-762-2394 t-

WOULD LIKE TO BUY OR TRADE for old books by James Oliver Curwood, write H.L. Purvis, Rt. 3, Box 192, Bristow, Okla. 74010 t-

MEC 600 Jr. shot shell reloader. Lots of components. Like new. $60. 918-762-2917 t-

HUNTING BOW: 46 olb. Like new. $50. 918-762-2917 t-

WANTED: Coon hides, skinned or unskinned, treeing walker pups. 372-6658 t-

FOR SALE: 10x16 building Insulated, paneled, wood siding. It can be used

TV & STEREO EQUIPMENT

ZENITH solid state AM-AFC-FM tape phono, attractive portable stand with portable speakers. 918-762-2394 t

FOR SALE: Panasonic 8-track player recorder. Excellent condition, hardly used. $75. Call 624-0681 u

FOR SALE: TV antenna, good condition. $5 or best offer. 372-0459 t

PANASONIC TV 8" black & white with sunscreen. 4 mos. old. Lists $99.95, sell $70. 377-9684 or 372-7816 t

FOR SALE: All channel TV antenna, $20. Call 372-8233 after 5:00 t

FOR SALE: 2 G.E. B&W TV's. A 12" good picture, no sound. A 19" works

PETS & LIVESTOCK

AT STUD: Palomino quarterhorse stallion. Double bred Skipper W pedigree. Perkins, Okla. 405-547-2247 t

FOR SALE: AKC reg. Old English sheep dog pups. Some well marked. $125-$200. Ph. 336-4841. Ready Feb. 3 t

WANTED TO BUY: One set of regulation size jumps for dog obedience. If you have a set to sell, or can make a set (I have the dimensions), call 372-6774 after 5:30. I will pay a reasonable price for either. t

FOR SALE: AKC cocker spaniel puppies. Assorted colors & sexes, champion bloodlines. Deposit will hold until Valentine's Day. 377-9500

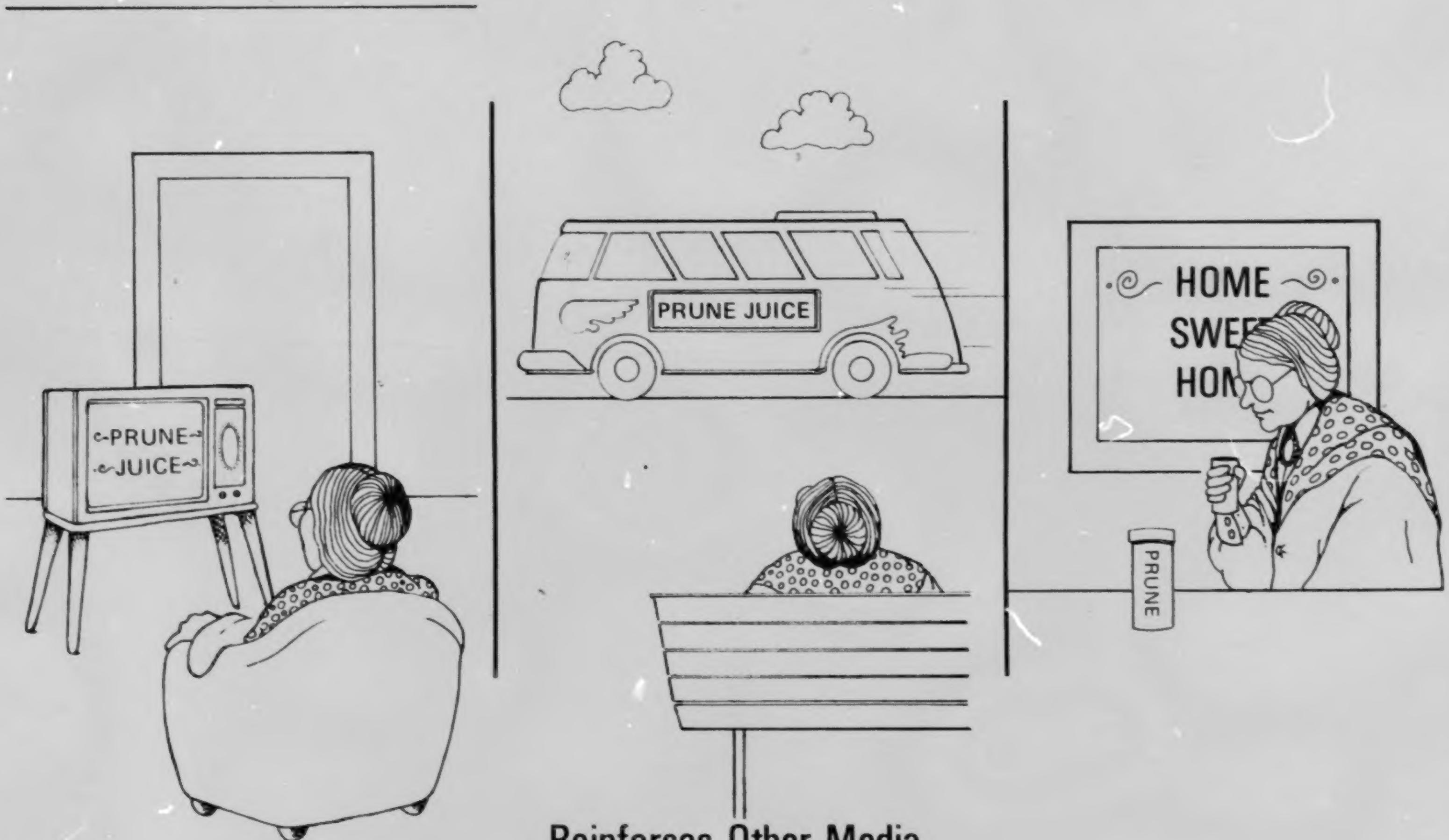
Community Datebook

The Stagecoach Community Theatre in Perry presents R. U. R. (ROSSUM!S UNIVERSAL ROBOTS). A fantastic melodrama of the future in three acts and an epilogue. Performances will be given on January 30 and 31 at 8:00 P.M. and there will be a matinee on February 1 at 2:00 P.M. in the Perry High School Auditorium. Tickets are $2.50 for adults and $1.25 for students. For information call 336-4515 or write Box 82, Perry, Oklahoma 73077.

FOGGY RIVER BOYS, from Branson-Silver Dollar City, Mo. area, in PAWNEE, SATURDAY, January 24, 8 P.M., Gymnasium. Two-hour family entertainment, comedy, all types music. Benefit: Pawnee Band Booster Club.

EPSILON SIGMA ALPHA BENEFIT BRIDGE. First National Bank Community Room. January 24, 1:00-4:00. Refreshments and prizes. Come with your favorite bridge-playing friends—spend the afternoon playing and give to our philanthropic projects. For tickets, call 624-0082 or 372-4682. Tickets are $1.25 each.

Car-Card Advertising

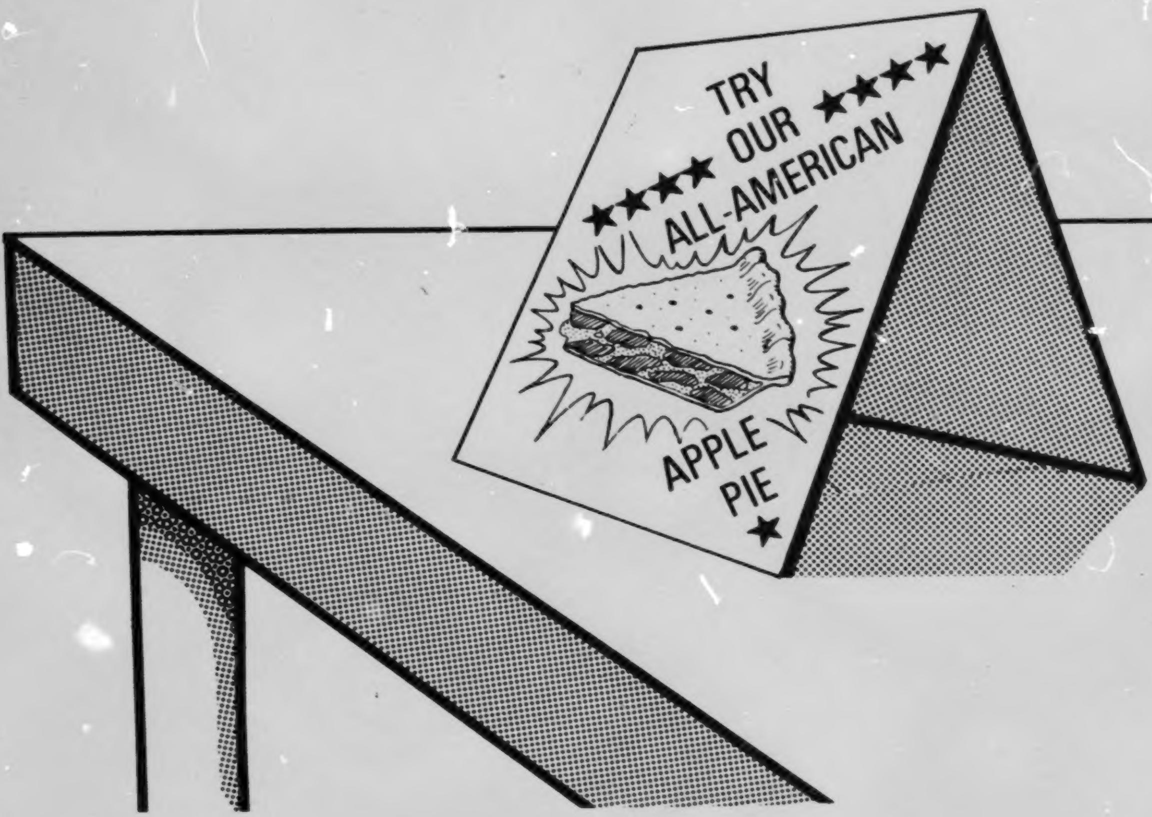

PRUNE JUICE
PRUNE JUICE
HOME
SWEE
HOM
PRUNE

Reinforces Other Media

Catalogs

OTASCO
TIR
WARDS
SEARS
PENNEYS
NIEMAN
MARCUS

Table Tent


TRY
OUR
ALL-AMERICAN
APPLE
PIE

TM 7

DE II - 29-F

ADVERTISING MEDIA
UNIT I

ASSIGNMENT SHEET #1--PROMOTIONAL AND INSTITUTIONAL ADVERTISING

Listed below are examples and/or uses of advertising. Check each of the uses and/or examples as either being institutional or promotional.

	DESCRIPTIONS OF ADVERTISEMENTS	PROMOTIONAL	INSTITUTIONAL
1.	An ad wishing its customers a happy holiday	______	______
2.	An ad featuring a furniture sale	______	______
3.	An ad featuring the new uses of a product	______	______
4.	An ad featuring the business hours of a bank	______	______
5.	An ad featuring the buying terms of a department store	______	______
6.	An ad featuring an acknowledgement for the services of an employee who has been with the company for 20 years	______	______
7.	An ad featuring the trustworthiness of a company	______	______
8.	An ad featuring the DE students who work for the company	______	______
9.	An ad featuring the introduction of a new model outboard motor	______	______
10.	An ad featuring a full line of children's clothes	______	______
11.	An ad featuring the store's participation in the annual United Fund drive	______	______
12.	An ad featuring a clearance sale on winter coats	______	______

ADVERTISING MEDIA
UNIT I

ASSIGNMENT SHEET #2--FIGURING ADVERTISING COSTS WITH RATE CARDS

After reading the example, figure the problems below. Use the sample rate cards on the following pages.

Example: Figure the cost of placing eight 6" x 10" ads during the month

10" x 6" = 60 column inches in one ad
60" x 8 = 240 total column inches during the month
240" x $1.32 = $316.80

1. 3" x 3" ad in a newspaper which ran four times during the month. The account was paid one month late.

2. 40 column inch newspaper ad in black and three colors. It ran only once.

3. Six one minute spot announcements over the radio station for thirty days. Received the discount for the month.
   a. Use normal rates
   b. Use prime time rates

ASSIGNMENT SHEET #2

GOTHAM DAILY NEWS

ADVERTISING RATES

EARNED RETAIL RATE SCHEDULE

Applicable only to local retail firms or service establishments for their own display advertising. Advertising not considered by the publisher as "local retail" will be charged at the general advertising rate.

(Based on column inches used per month)

Inches Per Month	Rate per inch
1-24	1.68
25-49	1.51
50-99	1.43
100-199	1.36
200-299	1.32
300-399	1.29
400-599	1.26
600-799	1.23

At the end of each calendar month, advertising will be charged at the rate earned, according to above schedule. If account is not paid by the 10th of month following billing, advertiser will be charged 1 1/2 percent per month on unpaid balance.

PREPRINT INSERT RATES

65 percent of earned ROP advertising rate. We reserve the right to accept or decline any preprinted material.

EXTRA INSERTION DISCOUNT

Any advertisements originating in a Sunday, Wednesday, or Thursday edition, may be repeated (within 7 days) in a Monday, Tuesday, or Friday edition, without copy change, at advertiser's rate LESS 20 PERCENT DISCOUNT. Mechanical department time required to make copy changes for EID insertions will be billed at $10 per hour. Advertisements originating Monday, Tuesday, or Friday may be repeated Sunday, Wednesday, or Thursday under same terms and discount. EID minimum, 5 in.

MONTHLY CARD RATES

26 Consecutive Insertions	22.36 per inch*
13 EOD	13.78 per inch

For each change of copy requested before completion of month, a 5 percent charge will be made, with a minimum of $1. One change per month is allowed without charge after the first month. If a card advertisement is canceled before one month expires, total number of inches of space used will be charged to advertiser under the Earned Retail Rate Schedule.

* .85 per insertion per inch
1.06 per insertion per inch

COLOR ADVERTISING

When mechanical limitations permit, display advertisements may be printed in black and color for the following extra charge:

Black and one color	49.15
Black and two colors	92.35
Black and three colors	135.55
Double Truck, black and one color	73.45
Double Truck, black and two colors	139.30
Double Truck, black and three colors	203.60

No ad of less than 40 column inches accepted in color.

ASSIGNMENT SHEET #2

KSPI AM and FM Rate Schedule

LOCAL 9-R — EFFECTIVE JUNE 1, 1974

AM & FM RATES

1 Hour	$30.25
½ Hour	15.70
¼ Hour	9.65
5 Minute	6.05
Spot—60 Seconds	3.05
Spot—30 Seconds	2.40
*Shortie	1.75

*Minimum of 6 per day and a minimum of 50 shorties within 30 days of order. Ten seconds in length.

Spot Rate .... Prime Time

6:30 a.m. — 8:30 a.m.
12 Noon — 1:00 p.m.
5:00 p.m. — 6:00 p.m.

60 seconds	$3.70
30 seconds	3.00

PER MONTH DISCOUNT

$ 50 to $100	2%
$101 to $150	4%
$151 to $200	6%
$201 to $250	8%
$251 and over	10%

Discount applies only on Station Rates and if paid by the 10th of the month. Applies to regular spots and programs only.

REMOTE BROADCAST RATES

(On Premises)

All Day (9 to 12 a.m. and 1 to 5 p.m.)	$230.00
9 to 12 a.m. only	115.00
1 to 5 p.m. only	132.00

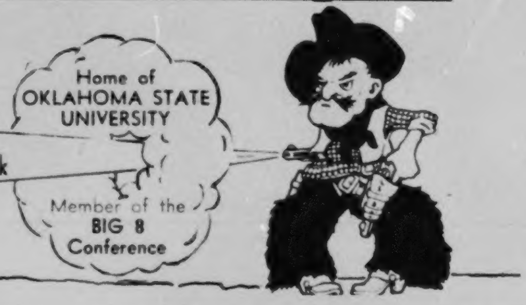
maximum of six minutes per hour from remote location.

SPECIAL PROGRAMS AND FEATURES

One time-signal hourly each day, per month	$205.00
One time-signal alternating hours each day, per month	105.00

Rates on request on OKLAHOMA STATE UNIVERSITY AND STILLWATER HIGH SPORTS, and many other special programs and features, including short, on-the-spot broadcasts.

KSPI originates the Cowboy Sports Network



Courtesy of KSPI

ADVERTISING MEDIA
UNIT I

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. Institutional
2. Promotional
3. Promotional
4. Institutional
5. Institutional
6. Institutional
7. Institutional
8. Institutional
9. Promotional
10. Promotional
11. Institutional
12. Promotional

Assignment Sheet #2

1. $55.18
2. $195.95
3. a. $494.10
   b. $599.40

ADVERTISING MEDIA
UNIT I

TEST

1. Match the terms on the right to the correct definitions by placing the appropriate numbers in the blanks provided. Terms and definitions are continued on the following page.

______a. Merchandise sold at a reduced price or even at a loss in order to attract customers into the store

______b. Public announcement which is paid for and has an identified sponsor

______c. Card containing information about cost and restrictions

______d. Presentation of facts which may be free and may not have an identified sponsor

______e. Various methods of giving out information

______f. Advertising which mainly attempts to sell specific merchandise

______g. Advertising done by local businesses

______h. Advertising used primarily to build customer goodwill and to present the store as a good place to shop

______i. Advertising in which the cost is shared by the local business and the manufacturer or supplier

______j. Advertising done on a nationwide level by manufacturers or suppliers

______k. Radio or television commercial that ranges from 10 to 60 seconds in length; usually purchased as a package of 10, 20, or 30 advertisements

______l. Advertising grouped in a special section of a newspaper and containing mostly copy with very few illustrations

1. Advertising budget
2. Advertising agency
3. Prime time
4. Leader
5. Advertising rate card
6. Media
7. Local advertising
8. Cooperative advertising
9. National advertising
10. Institutional advertising
11. Promotional advertising
12. Publicity
13. Advertising
14. Spot announcement
15. Network

______m. National organization which links television and radio stations together

______n. Cost of a single line of newspaper space per each million people reached by the newspaper circulation

______o. List of prospective customers

______p. Method of measuring and paying for some newspaper ads

______q. Advertisement that may be placed anywhere in the newspaper as opposed to specifying a particular section of the newspaper or position of the ad on the page

______r. Estimate of the amount of money to be spent on advertising during the year; usually based upon a percentage of last year's sales

______s. Time when the largest number of people listen to the radio or watch television and, thus, the time when it is most expensive to advertise

______t. Business which conducts market research and plans and executes advertising campaigns for firms and companies

16. Mailing list

17. R.O.P.

18. Column inch

19. Milline rate

20. Classified ad

2. Select from the following list the goals of advertising by placing an "X" in the correct blanks.

______a. To introduce new ideas, products, or services

______b. To sell specific goods, services, ideas, or companies

______c. To maintain goodwill

______d. To attract new customers

______e. To balance sales volume during a week or month when sales are lower

______f. To bring customers into the store

3. Select from the following list the kinds of merchandise to advertise.

______a. Slow moving merchandise

______b. Timely merchandise

______c. Reduced items

______d. New items and styles

4. Name the factors which determine when to advertise.

   a.

   b.

5. List one advantage and one disadvantage under each of the media given.

   a. Newspaper

      1) Advantage

      2) Disadvantage

   b. Magazine

      1) Advantage

      2) Disadvantage

   c. Direct mail

      1) Advantage

      2) Disadvantage

   d. Radio

      1) Advantage

      2) Disadvantage

   e. Television

      1) Advantage

      2) Disadvantage

6. Select from the following list true statements about the various forms of advertising media. Place an "X" in the correct blanks.

_____a. Table tent is a stand-up card placed on tables in restaurants

_____b. Shopping news is a newspaper consisting mainly of advertisements and usually distributed free of charge

_____c. Car-card advertising is advertising placed in busses, on taxis, in airports, and on the sides of automobiles

_____d. Handbill is an advertisement distributed door to door, placed on parked cars, or placed in sacks to announce grand openings and special promotions

_____e. Outdoor advertising includes billboards, posters, painted walls, and electrical signs

_____f. Catalog is a publication printed on a regular basis by mail order companies or on special occasions for a particular store or company

_____g. Directory advertising is an ad placed in the yellow pages of telephone directories covering the shopping areas

_____h. Program advertising is very profitable as it results in immediate sales as well as building goodwill

_____i. Specialty advertising is special advertising done exclusively by door-to-door salespeople

ADVERTISING MEDIA
UNIT I

ANSWERS TO TEST

1. a. 4
   b. 13
   c. 5
   d. 12
   e. 6
   f. 11
   g. 7
   h. 10
   i. 8
   j. 9
   k. 14
   l. 20
   m. 15
   n. 19
   o. 16
   p. 18
   q. 17
   r. 1
   s. 3
   t. 2

2. a, b, c, d, e, f

3. b, c, d

4. a. Heavy promotional periods

   b. Day of the week that is best for the type of store, product, and customers

5. Any one of the following under each of the categories:

   a. Newspaper

      1) Advantages

         a) Is widely read

         b) Is relatively inexpensive

         c) Can be changed relatively quickly

      2) Disadvantage--Has a short reading life

   b. Magazine

      1) Advantages

         a) Adds prestige to a product or business

         b) Can get effective use of color

         c) Has a long reading life

         d) May reach a select audience

         e) Is a good medium for educating consumers about a product or service

2) Disadvantages

a) Is relatively expensive

b) May waste circulation unless business's trading area is quite large

c) Is not easy to change on short notice

c. Direct mail

1) Advantages

a) Has direct and personal appeal to one group

b) May be used to make immediate sales by enclosing an order blank

c) Is relatively inexpensive if special postal rates can be obtained

2) Disadvantages

a) Requires that the mailing list be constantly revised

b) May be ignored by some people as merely "junk" mail

d. Radio

1) Advantages

a) Suited for products of general demand because of large diversified audience

b) Can be changed relatively easily

c) Can be repeated frequently

d) Is relatively inexpensive

2) Disadvantages

a) May waste coverage on many people who are not potential customers

b) Is not suited for products that must be seen to develop customer interest

e. Television

1) Advantages

a) Has a large diversified audience

    - b) Is good for national advertising
    - c) Adds prestige to a product or business
    - d) Is easy to show demonstration of a product
  - 2) Disadvantage--Is expensive

6. a, b, c, d, e, f, g

ADVERTISING LAYOUT
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to construct a rough draft of an ad layout and judge whether an ad will be an effective selling instrument. He/she should be able to answer questions about the parts of an ad, the location of an ad in the newspaper, color, layout design, focal points, sale ads, and the stages in developing ad layouts. This knowledge will be evidenced by scoring eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with advertising layout to the correct definitions.
2. List the major parts of an advertising layout.
3. Select from a list true statements about the characteristics of a good headline.
4. Select from a list purposes of subheadings.
5. Select from a list true statements about the characteristics of good copy.
6. Select from a list true statements about illustrations.
7. Select from a list factors which determine the best location for an ad in the newspaper.
8. Name factors to remember when selecting color for an ad.
9. List ways to assure wise use of white space in an ad.
10. Select from a list true statements about layout design.
11. Identify the main focal point of an illustration.
12. Match stages in developing ad layouts to descriptions of each.
13. Select from a list true statements about a sale ad.
14. Construct an ad layout.
15. Judge an ad layout.

ADVERTISING LAYOUT
UNIT II

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

  A. Give pretest using objective sheet.

  B. Provide student with objective sheet.

  C. Provide student with information and assignment sheets.

  D. Make transparencies.

  E. Discuss unit and specific objectives.

  F. Discuss information and assignment sheets.

  G. Gather examples of advertisements showing the principles covered in this unit.

  H. Provide periodicals for students to find examples of the principles covered in this unit, particularly in recognizing the use of benefits and buying motives.

  I. Cut parts of an ad, such as the illustrations and logotypes, out of magazines and newspapers for the students to arrange in a pleasing layout.

  J. Reproduce DECA ad layout sheets or request them from the state DECA advisor.

  K. Obtain slick books from newspaper or printing office.

  L. Give test.

  M. Reteach if necessary.

  N. Test again until minimum standard is reached.

II. Student:

  A. Read objective sheet.

  B. Study information sheet.

  C. Take notes.

  D. Complete assignment sheets.

  E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Transparency masters

      1. TM 1--Logotypes
      2. TM 2--Sample Page from a Specimen Book
      3. TM 3--Omnibus Advertising
      4. TM 4--Mat or Matrix
      5. TM 5--Balance
      6. TM 6--Expressive Lettering
      7. TM 7--Major Parts of an Advertising Layout
      8. TM 8--Too Many Headlines
      9. TM 9--Illustrations Direct Attention to the Message
      10. TM 10--White Space
      11. TM 11--Panel Forms
      12. TM 12--Four-Point Principle
      13. TM 13--Layouts from Simple Shapes
      14. TM 14--Layouts from Simple Shapes (Continued)
      15. TM 15--Proportion
      16. TM 16--Proportion (Continued)
      17. TM 17--Attention-Getters
      18. TM 18--Focal Points
      19. TM 19--Focal Point Used in Layout
      20. TM 20--Development Stages
      21. TM 21--Development Stages (Continued)

D. Assignment sheets

    1. Assignment Sheet #1--Construct an Ad Layout
    2. Assignment Sheet #2--Judge an Ad Layout

E. Test

F. Answers to test

II. References:

A. Nolan, Carroll A., and Warmke, Roman F. *Marketing, Sales Promotion, and Advertising.* 7th ed. Dallas: South-Western Publishing Co., 1965.

B. Ocko, Judy Young. *Retail Advertising Copy: The How, The What, The Why* New York: National Retail Merchants Association, 1975.

C. Nelson, Roy Paul. *The Design of Advertising.* Dubuque, Iowa: William C. Brown Co., 1972.

D. Samson, Harland E. *Advertising and Displaying Merchandise.* Dallas: South-Western Publishing Co., 1967.

E. Richert, Henry G.; Meyer, Warren G.; Haines, Peter G.; and Harris, Edward G. *Retailing Principles and Practices.* 6th ed. Dallas: Gregg Division/McGraw-Hill Book Co., 1974.

ADVERTISING LAYOUT
UNIT II

INFORMATION SHEET

(NOTE: The information in this unit is related to newspapers since newspapers are the media most frequently used by retailers. Students should realize that they may find good ads which have exceptions to some of the rules stated here. A good ad is judged by its overall effect.)

I. Terms and definitions

A. Layout--Arrangement of copy and illustrations on the printed page

B. Copy--Words and printed material on an advertisement

C. White space--Unprinted areas within the borders of an advertisement

D. Logotype (signature cut)--Name or symbol of the store or company (Transparency 1)

(NOTE: This is usually placed at the bottom or upper left of an ad.)

E. Slick book (clip art)--Book supplied by printing shops and newspapers from which advertisers may select illustrations of all sizes and brand names (Transparency 2)

Examples: 16 oz bottle of Crisco oil, 24 oz bottle of Crisco oil
16 oz bottle of Mazola oil, 24 oz bottle of Mazola oil

F. Omnibus advertising--Advertisement that contains a variety of unrelated items (Transparency 3)

G. Proof--Copy of an advertisement which is given to the advertiser to be checked for errors before being printed

H. Mat (matrix)--Papier-mâché mold often furnished by a company or manufacturer; used to engrave some advertisements (Transparency 4)

I. Focal point--Spot within a rectangle where the eye naturally pauses (Transparencies 18 and 19)

J. Optical center--Point a little above the actual measured center

(NOTE: If the ad is placed in the actual measured center rather than the optical center, the ad will appear out of proportion.)

INFORMATION SHEET

K. Formal balance--Elements spaced evenly on both sides of an ad (Transparency 5)

(NOTE: This type of balance gives a feeling of calmness or dignity.)

L. Informal balance--Elements are not the same on both sides but balance is obtained by varying the distance of the larger, heavier elements from the center (Transparency 5)

(NOTE: This type of balance gives a feeling of force, movement, surprise, or excitement. To test the balance of an ad look at it in a mirror or turn it upside down.)

M. Type face--Style of letters (Transparency 6)

II. Major parts of an advertising layout (Transparency 7)

A. Headline

B. Subheading

C. Copy

D. Illustration

E. White space

F. Border

G. Type face

H. Logotype

III. Characteristics of a good headline

(NOTE: The headline determines approximately 75% of the effectiveness of an ad.)

A. Catches prospective customer's attention

(NOTE: An ad has only approximately three seconds to catch a reader's attention as he/she thumbs through the newspaper.)

1. Stresses "you" and "yours"
2. Arouses curiosity
3. Sounds like exciting news

INFORMATION SHEET

B. Leads prospective customer to read the rest of the ad

1. Indicates the content of the ad

   (NOTE: Avoid making the headline too cute. Clever slogans are fine for national manufacturers who want their name to be remembered and their products purchased sometime somewhere. However, a local store doing the advertising wants to sell specific merchandise immediately. Therefore, the headline should give a clue to the type of merchandise and content of the ad.)

2. Stresses customer benefits

   (NOTE: Some advertisers recommend that the name of the product or brand name not be used alone as the headline.)

3. Appeals to customer's buying motives

C. Is always honest

(NOTE: Dramatize but don't exaggerate your product.)

D. Is easy to read

1. Write in straight lines with the words reading from left to right

   (NOTE: Studies show that this type of headline is more effective than a headline which is vertical, slanted, or backwards.)

2. Avoid the need for punctuation within the headline

   (NOTE: Punctuation should be used in the copy. However, the need for punctuation, other than an occasional exclamation point or question mark at the end of the headline, should be avoided.)

3. Avoid hyphenated words

4. Avoid using white letters on a black background too frequently

   (NOTE: This is sometimes called a negative or reverse.)

5. Avoid using too many headlines (Transparency 8)

E. Is timely

(NOTE: Use words, phrases, and ideas that are currently popular from books, movies, and current events.)

INFORMATION SHEET

F. Uses action verbs

Examples: "Revel in a Bath of Imported Oils"
"Collect This Set of Fine Crystal Glassware for Your Dining Pleasure"
"Savor the Flavor of Homemade Biscuits"

G. Uses persuasive selling words

Examples: You, money, save, new, free, friend, results, health, easy, safety, quick, now, love, discovery, proven, guarantee, proud, bargain

(NOTE: Research has shown these words to be especially effective for triggering action.)

H. Is easily recognized as the store's ad before seeing the logotype because of the ad's entire effect or style

(NOTE: Many of the above points apply throughout the ad, as well as to the headline.)

IV. Subheading

A. Breaks monotony

B. Explains the headline further

C. Gives clues to the main points covered in each block of copy

D. Helps the reader choose those parts of the ad in which he/she is most interested

V. Characteristics of good copy

(NOTE: Read the ad as a customer who has never seen the ad before. Then ask yourself, "Is it too wordy and do the sentences follow a logical order?")

A. Gives the reason for buying the product (buying motives and customer benefits)

B. Gives the reason for shopping in the store

C. Urges the reader to buy now

Examples: "Limited supply"
"This week only"
"Enclosed coupons"

INFORMATION SHEET

D. Avoids clichés

Examples: "Tried and true"
"Last but not least"

E. Avoids abbreviations

F. Uses specific descriptions

Examples: Don't say you're easy to get to, show a map
Don't say you have the best brands, list them

G. Includes important store information

Examples: Address, telephone number, credit cards accepted, free parking

H. Sounds enthusiastic

I. Is informative

J. Is fun to read

K. Does not use too many kinds of type face

L. Uses mostly complete sentences

M. May begin with bold letters

VI. Illustrations

(NOTE: The advertiser should ask whether a larger picture or more copy would sell the merchandise better.)

A. Present merchandise effectively

B. Guide the reader's attention to the advertising message (Transparency 9)

C. Should have all related items priced

Example: If a dinette set includes only a table and chairs but a matching china closet is shown in the background of the illustration, the china closet should be priced separately to avoid confusion and accusations of false advertising

D. May be the dominant attention-getter for the ad

Examples: Action pictures, photographs of local people

INFORMATION SHEET

VII. Location of the ad in the newspaper

A. Outside edge of page

(NOTE: It is easier to see when the reader is just thumbing through the newspaper.)

B. Next to reading material

Example: Restaurant ad may be most effective next to the movie advertisements

C. In a particular section of the newspaper that is widely read by prospective customers

Example: Ads appealing primarily to men may be most effective in the sports section

VIII. Color

A. Use only if it dramatizes the merchandise and increases sales enough to justify the additional cost

B. Use only the purest and brightest colors

(NOTE: Red is one of the most effective colors to use in an ad.)

IX. White space

(NOTE: A lot of white space gives a feeling of luxury or prestige. A lot of black print gives more of a feeling of bargains.)

A. Indent from the thin column border before beginning the ad's border (Transparency 10)

B. Use simple panel forms to help group information (Transparency 11)

C. Allow elements of the layout to touch the boundry only once on each of the four sides (Transparency 12)

X. Layout designs

A. Should direct the eye smoothly from the top of the ad through the center, and to the bottom of the ad

(NOTE: White space, lines, direction the illustration is facing, and copy help the eye to flow through the ad.)

B. Often follow the shapes of letters of the alphabet (Transparencies 13 and 14)

Examples: S, C, Z, J, I, S, A, H, L, O, T, U, K

INFORMATION SHEET

C. Should keep each element of the ad in proportion and harmony with the other elements (Transparencies 15 and 16)

D. May use attention-getters (Transparency 17)

XI. Determining main focal point (Transparencies 18 and 19)

A. Draw a diagonal line connecting the upper left corner and the lower right corner

B. Draw a line from the upper right corner to meet the diagonal line

C. Divide each side of the ad into three parts for an alternative, quick, approximate position of the focal points

XII. Stages in development of ad layout (Transparencies 20 and 21)

A. Thumbnail sketch--Small outline with a few lines and shapes to show the placement of the headline, copy, illustration, and logotype

B. Rough draft--Best thumbnail sketches enlarged and drawn a number of times until all the elements are the exact size and position

C. Comprehensive (sometimes called "semi-comprehensive" or "semi-comp")--Traced from the rough layout with enough detail added to show how the finished advertisement will look

XIII. Sale ad

A. Should sell savings and merchandise

(NOTE: You are not selling the price alone, but you are selling merchandise at a price. Therefore, show the customers that they are getting more than their money's worth by purchasing the merchandise during the sale.)

B. Should give a reason for the sale

Examples: Anniversary, special purchase from an overloaded manufacturer, season clearance, pre-inventory sale

C. May emphasize price or the savings by comparing the sale price to the original

Logotypes

TG&Y
family centers

Anthony's
C.R. ANTHONY CO.

S
SHEPLERS
INC.

Meadow Gold ®

McDonald's ®

MERCEDES-
BENZ

GOODYEAR

McGREGOR
McGREGOR

ADAIR'S
CAFETERIAS

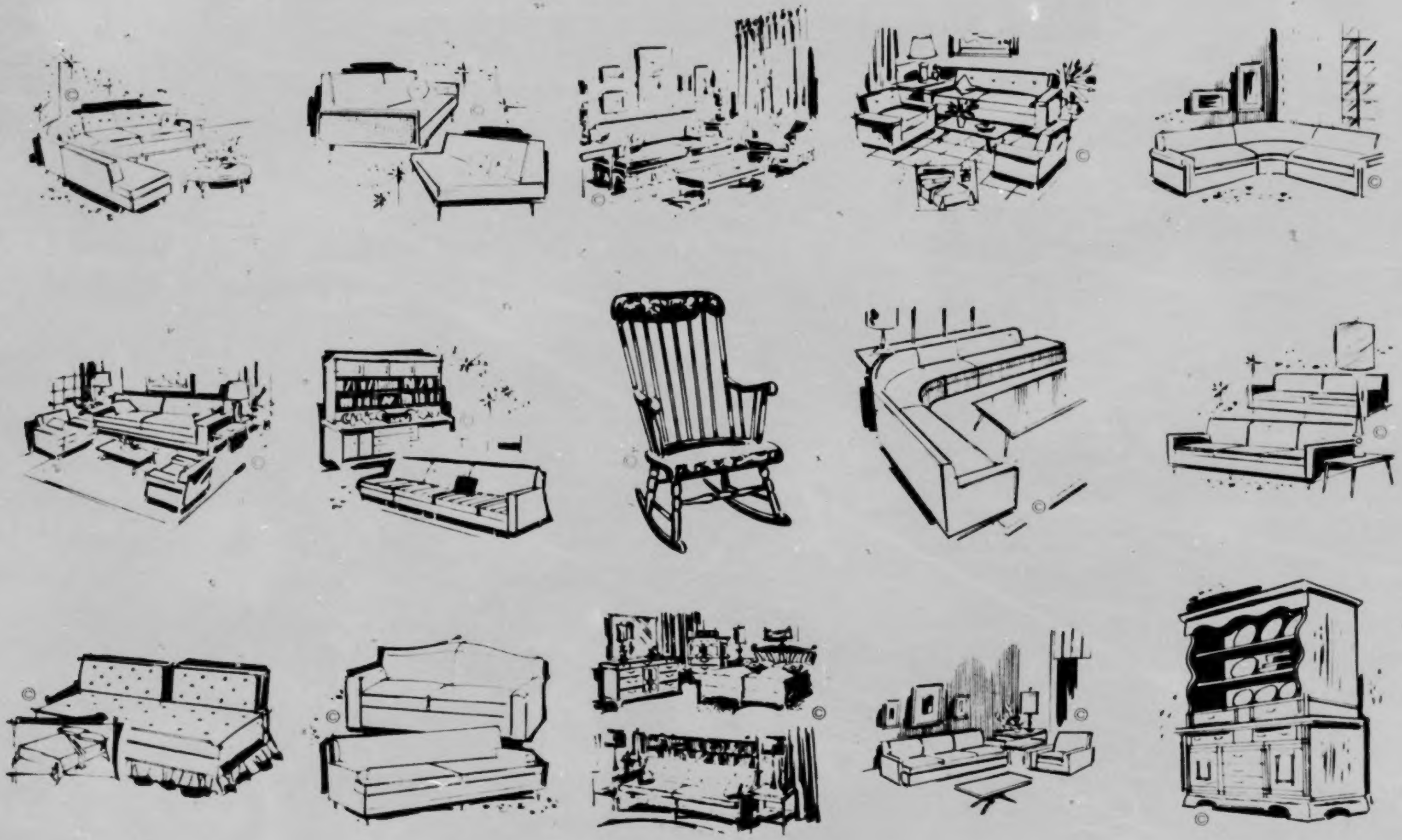
MERCURY
LINCOLN

B C Clark

TM 1

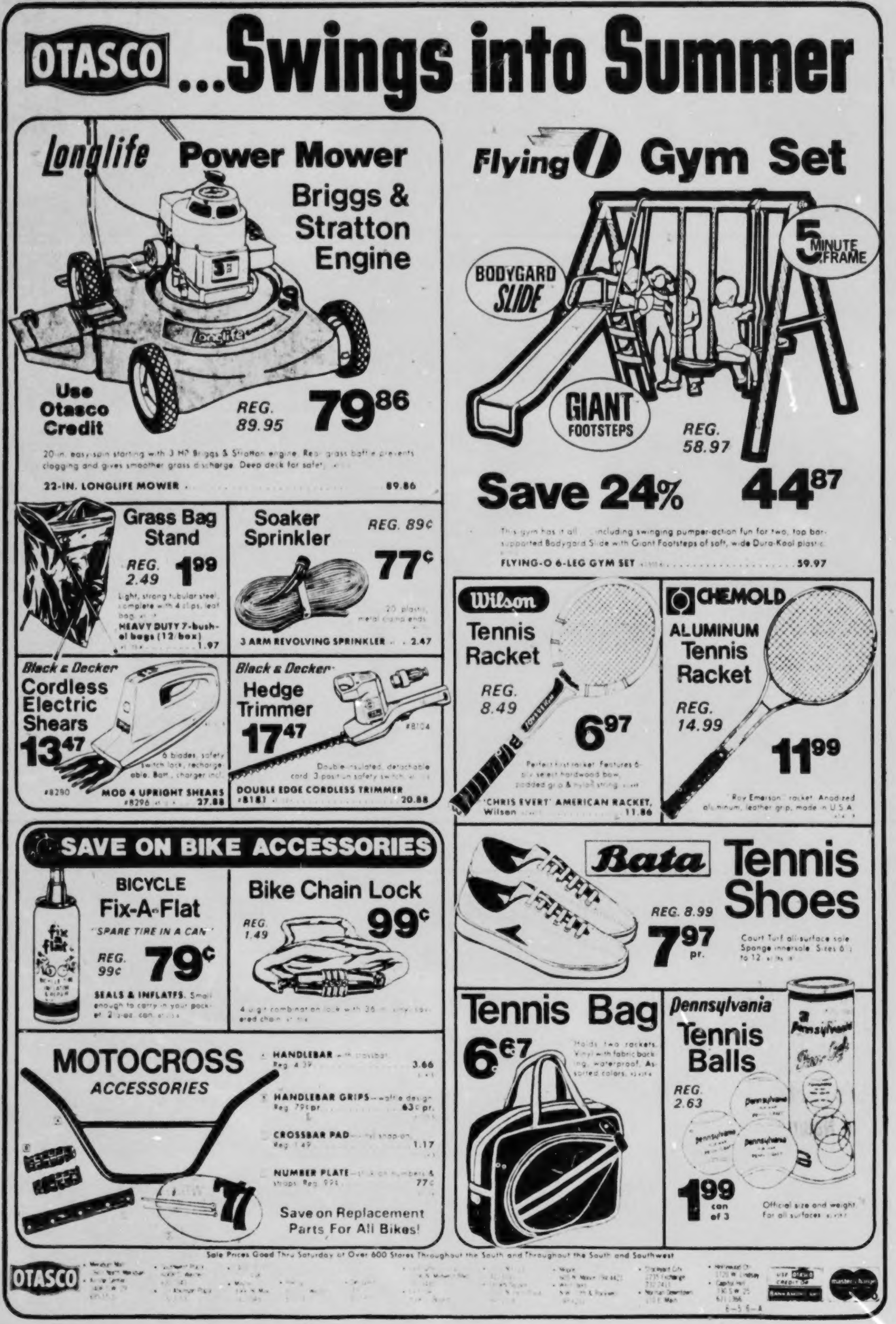
DE II - 61-F

Sample Page From a Specimen Book



DE II - 65-F

Omnibus Advertising



OTASCO ...Swings into Summer

Longlife Power Mower
Briggs & Stratton Engine

Use Otasco Credit

REG. 89.95 **79.86**

20-in. easy-spin starting with 3 HP Briggs & Stratton engine. Rear grass baffle prevents clogging and gives smoother grass discharge. Deep deck for safety.

22-IN. LONGLIFE MOWER 89.86

Grass Bag Stand
REG. 2.49 **1.99**
Light, strong tubular steel, complete with 4 clips, leaf bag.
HEAVY DUTY 7-bushel bags (12/box) 1.97

Soaker Sprinkler
REG. 89¢ **77¢**
20' plastic, metal clamp ends.
3 ARM REVOLVING SPRINKLER . . . 2.47

Black & Decker Cordless Electric Shears
13.47
6 blades, safety switch lock, rechargeable. Batt., charger incl.
#8290
MOD 4 UPRIGHT SHEARS #8296 . . . . 27.88

Black & Decker Hedge Trimmer
17.47
#8104
Double-insulated, detachable cord. 3 position safety switch.
DOUBLE EDGE CORDLESS TRIMMER #8181 . . . . 20.88

Flying O Gym Set
BODYGARD SLIDE
5 MINUTE FRAME
GIANT FOOTSTEPS
REG. 58.97
Save 24% 44.87

This gym has it all . . . including swinging pumper-action fun for two, top bar-supported Bodygard Slide with Giant Footsteps of soft, wide Dura-Kool plastic.

FLYING-O 6-LEG GYM SET 59.97

Wilson Tennis Racket
REG. 8.49 **6.97**
Perfect first racket. Features 6-ply select hardwood bow, padded grip & nylon string.
'CHRIS EVERT' AMERICAN RACKET, Wilson 11.86

CHEMOLD ALUMINUM Tennis Racket
REG. 14.99 **11.99**
"Roy Emerson" racket. Anodized aluminum, leather grip, made in U.S.A.

SAVE ON BIKE ACCESSORIES

BICYCLE Fix-A-Flat
"SPARE TIRE IN A CAN"
REG. 99¢ **79¢**
SEALS & INFLATES. Small enough to carry in your pocket. 2½-oz. can.

Bike Chain Lock
REG. 1.49 **99¢**
4-digit combination lock with 36-in. vinyl-covered chain.

MOTOCROSS ACCESSORIES

HANDLEBAR — with crossbar. Reg. 4.39 . . . . 3.66
HANDLEBAR GRIPS — waffle design. Reg. 79¢ pr. . . . . 63¢ pr.
CROSSBAR PAD — vinyl snap-on. Reg. 1.49 . . . . 1.17
NUMBER PLATE — stick-on numbers & straps. Reg. 99¢ . . . . 77¢

Save on Replacement Parts For All Bikes!

Bata Tennis Shoes
REG. 8.99 **7.97 pr.**
Court Turf all-surface sole. Sponge innersole. Sizes 6½ to 12.

Tennis Bag
6.67
Holds two rackets. Vinyl with fabric backing, waterproof. Assorted colors.

Pennsylvania Tennis Balls
REG. 2.63
1.99 can of 3
Official size and weight. For all surfaces.

Sale Prices Good Thru Saturday at Over 600 Stores Throughout the South and Throughout the South and Southwest

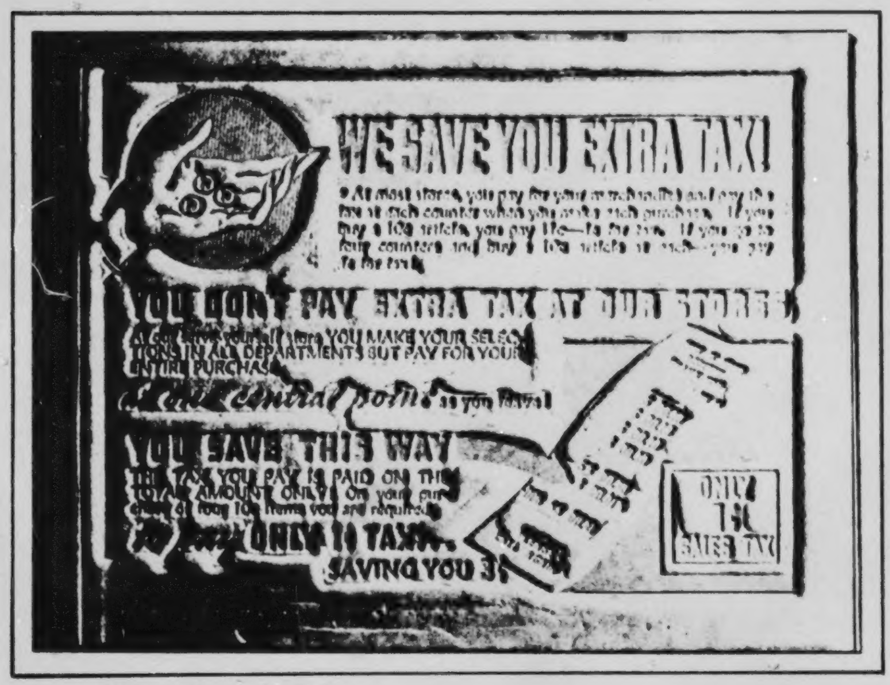
OTASCO

[illegible]

E—5 6—A

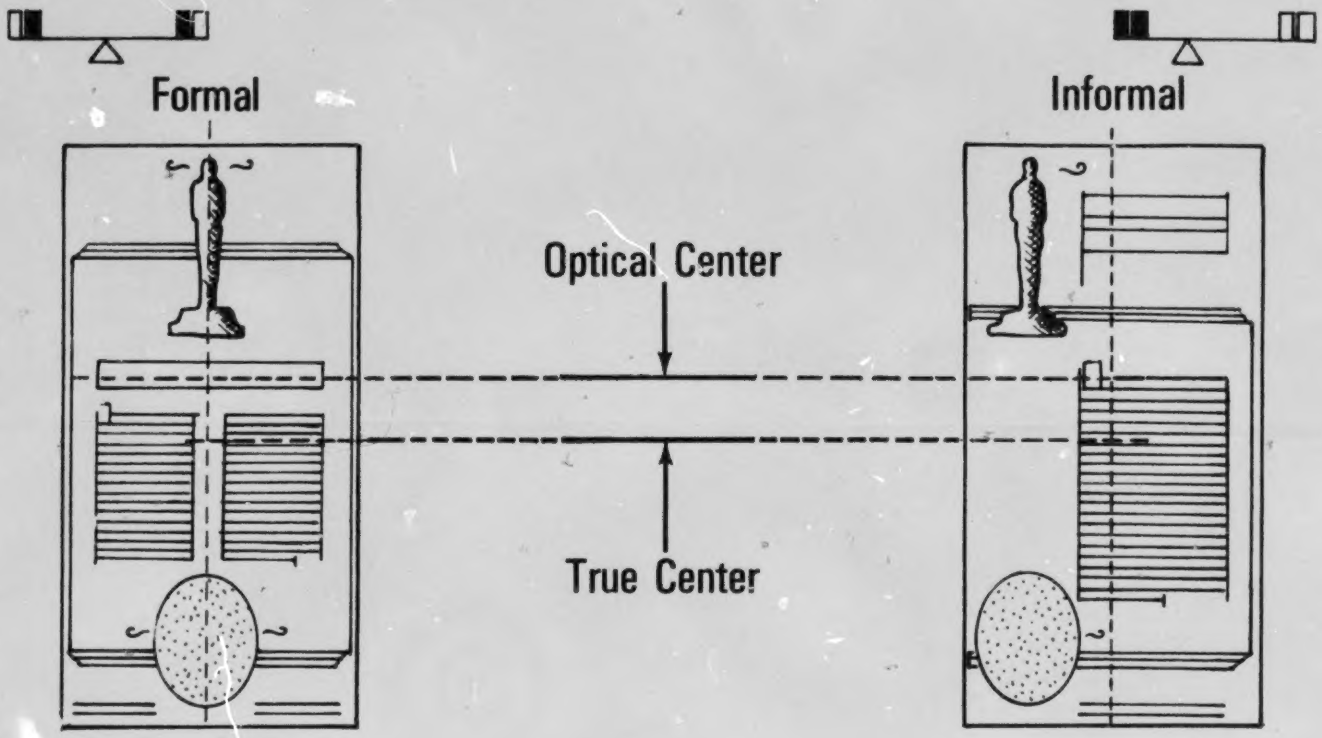
TM 3

Mat or Matrix


WE SAVE YOU EXTRA TAX!
YOU DON'T PAY EXTRA TAX AT OUR STORES
YOU SAVE THIS WAY
ONLY 1¢ TAX
SAVING YOU 3¢
ONLY 1¢ SALES TAX

Courtesy of National Cash Register Co.

Balance



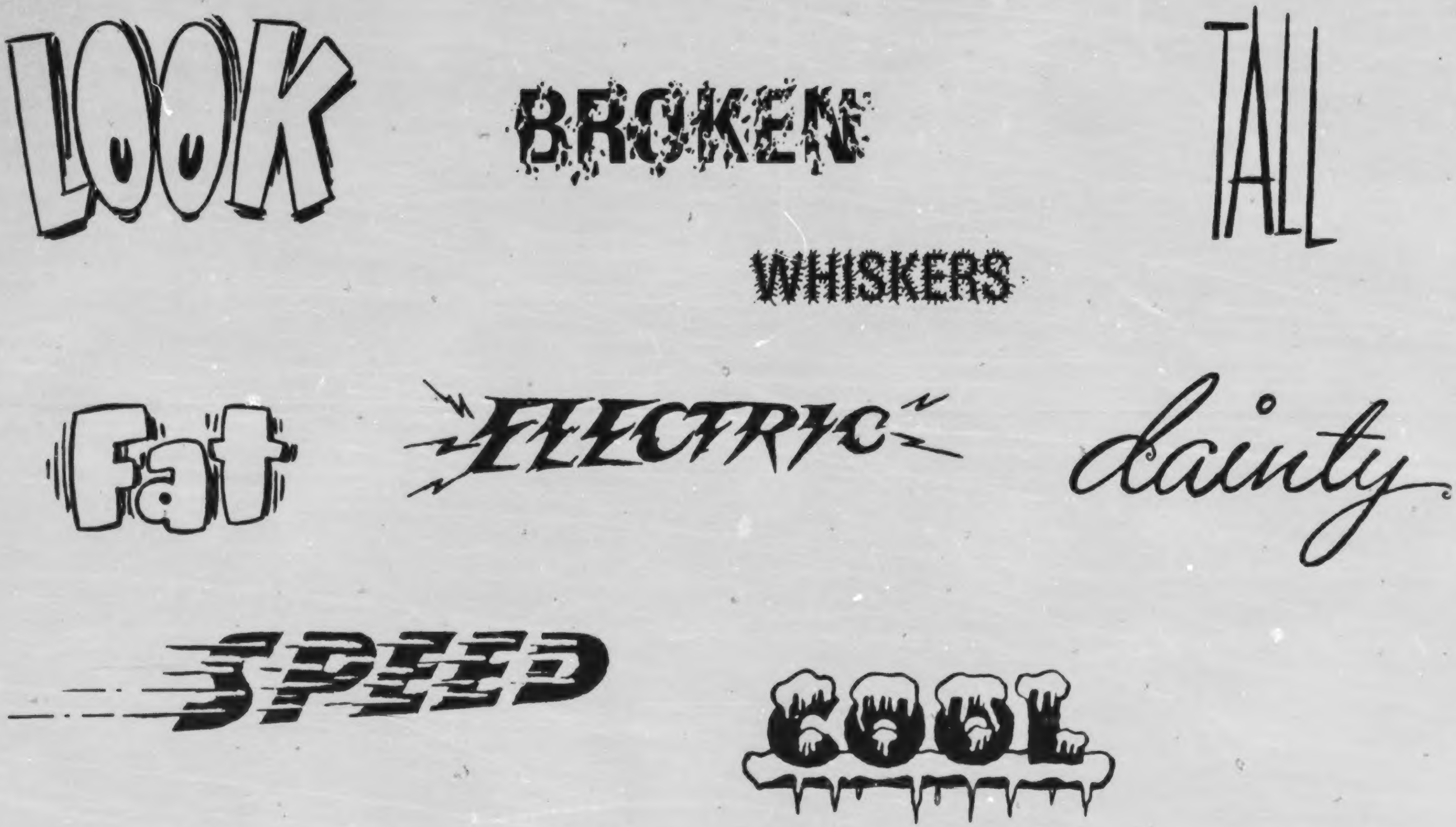
Formal

Informal

Optical Center

True Center

Expressive Lettering


LOOK
BROKEN
TALL
WHISKERS
Fat
ELECTRIC
dainty
SPEED
COOL

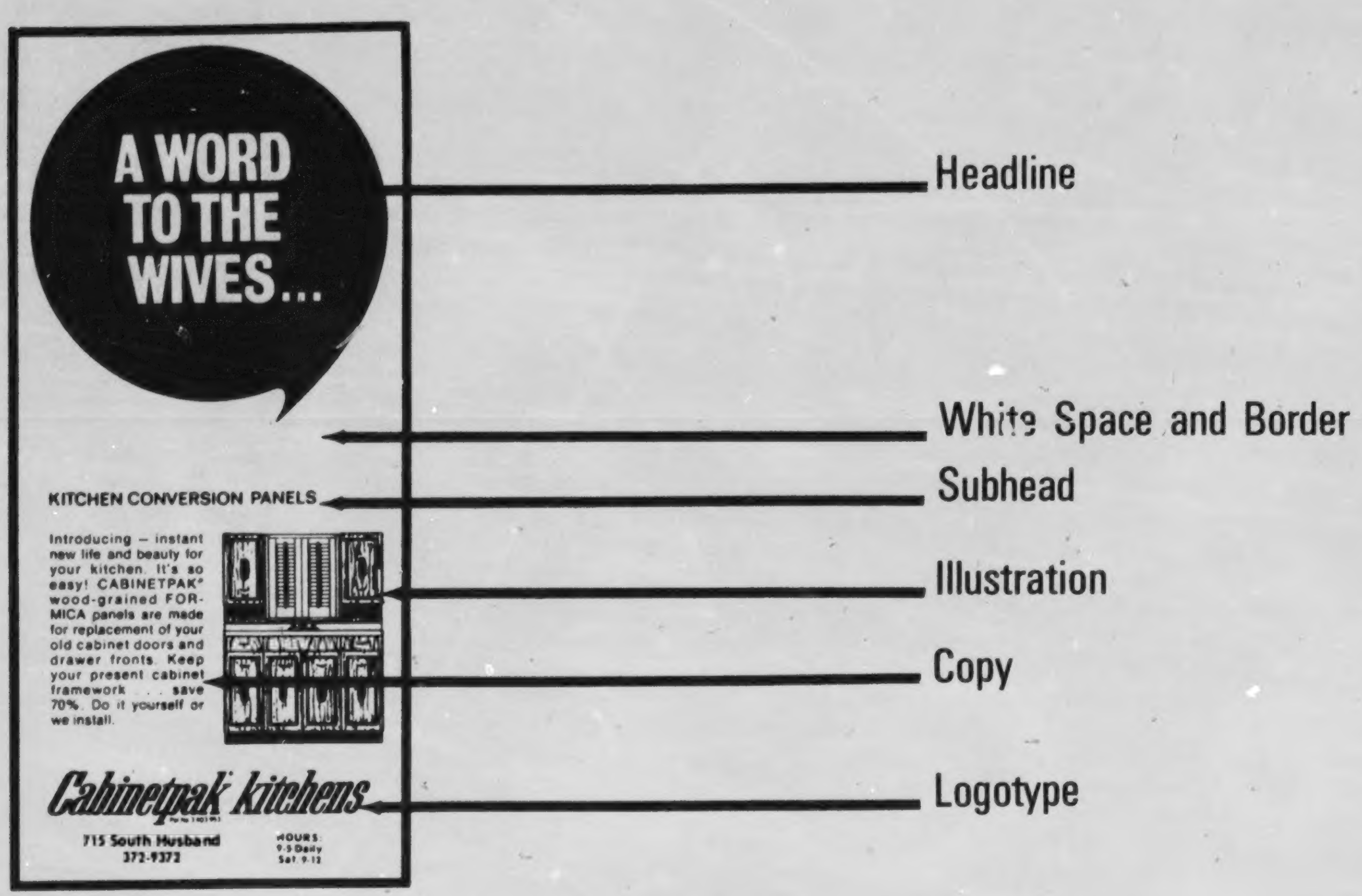
TM 6

611

612

DE II - 71-F

Major Parts of an Advertising Layout



A WORD TO THE WIVES...

KITCHEN CONVERSION PANELS

Introducing – instant new life and beauty for your kitchen. It's so easy! CABINETPAK® wood-grained FORMICA panels are made for replacement of your old cabinet doors and drawer fronts. Keep your present cabinet framework . . . save 70%. Do it yourself or we install.

Cabinetpak kitchens

715 South Husband
372-9372

HOURS:
9-5 Daily
Sat. 9-12

Headline

White Space and Border

Subhead

Illustration

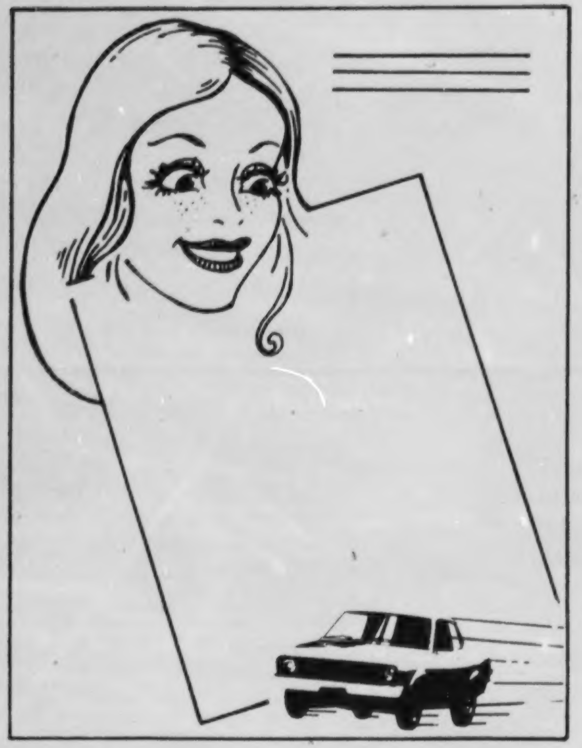
Copy

Logotype

Too Many Headlines

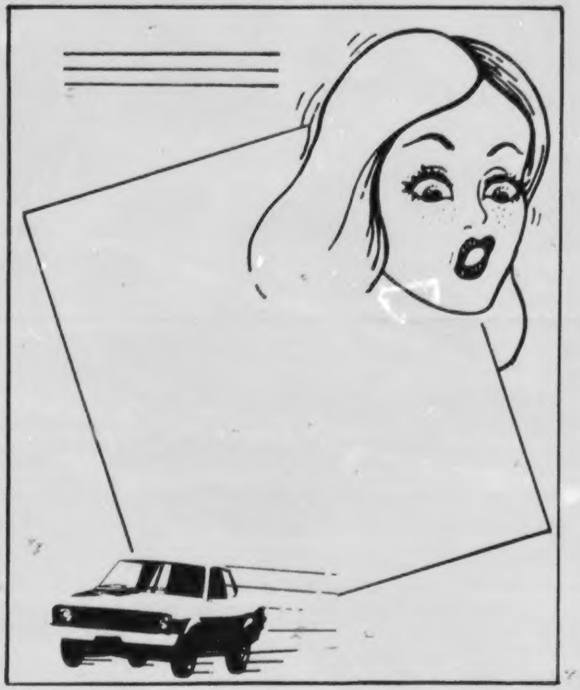
THE TRYAD ART GALLERIES
ESTABLISHED 1827
TRYAD and COMPANY, INC.
Denver and Canton Streets, Chicago, Illinois
A Very Wonderful Assemblage of
ORIENTAL RUGS and CARPETS
INCLUDING MANY
BEAUTIFUL CHINESE RUGS AND CARPETS
The Hainon Tokayan Collection
WILL BE SOLD AT PUBLIC AUCTION
JANUARY 25 TO FEBRUARY 7
Afternoon Sessions at 2:30 P. M.
Evening Sessions at 7:45 P. M.
CONTINUOUS·EXHIBITION

Illustrations Direct Attention to the Message



Right

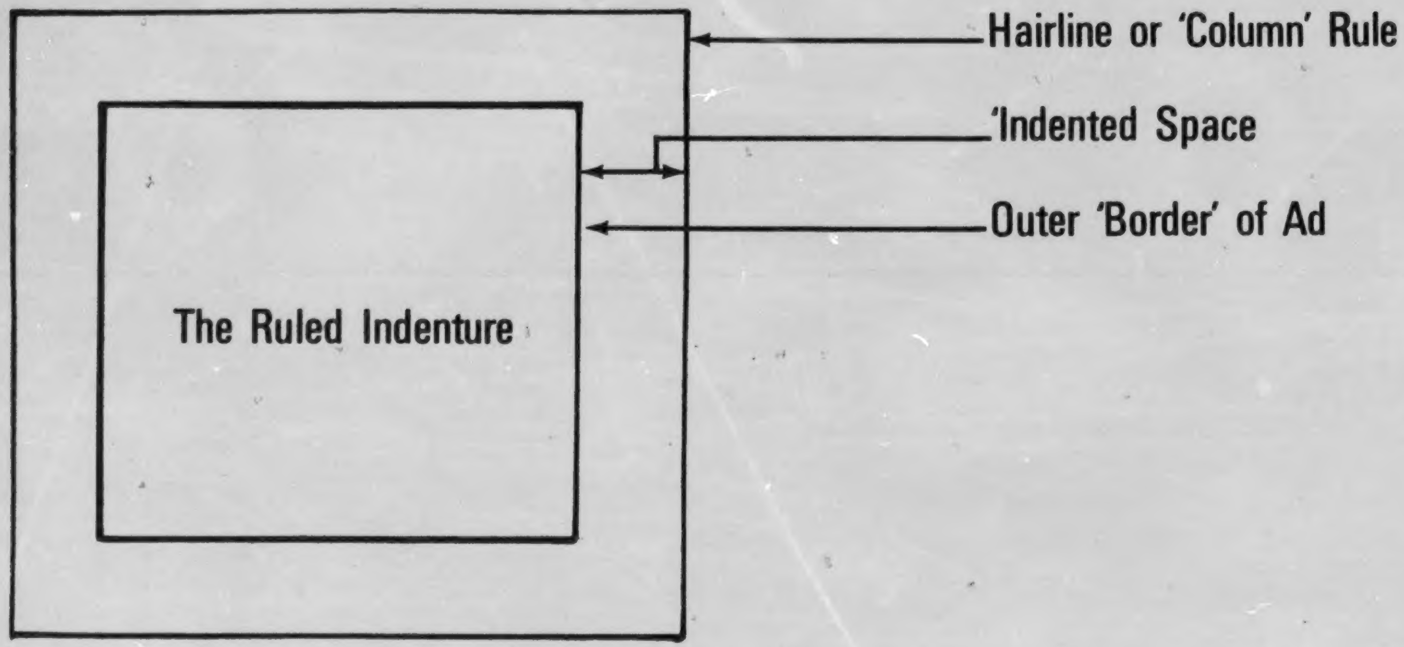
Illustrations and Action Statements Should Lead the Eye Into the Ad .... Not Out



Wrong

White Space

Hints That Help in Assuring 'White Space'



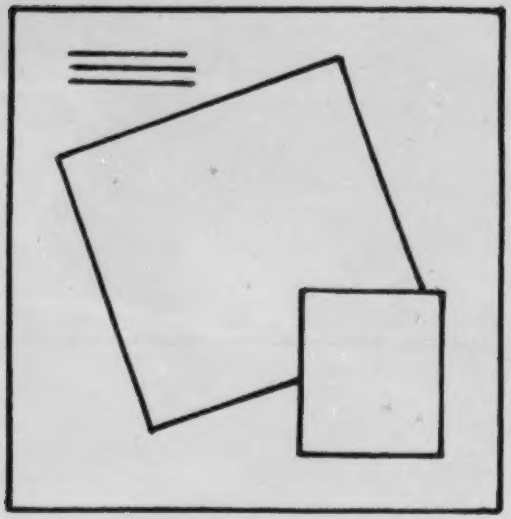
Hairline or 'Column' Rule

'Indented Space

Outer 'Border' of Ad

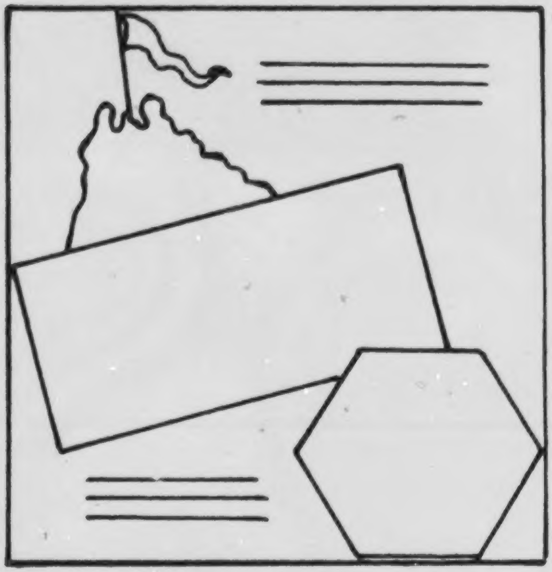
The Ruled Indenture

Panel Forms



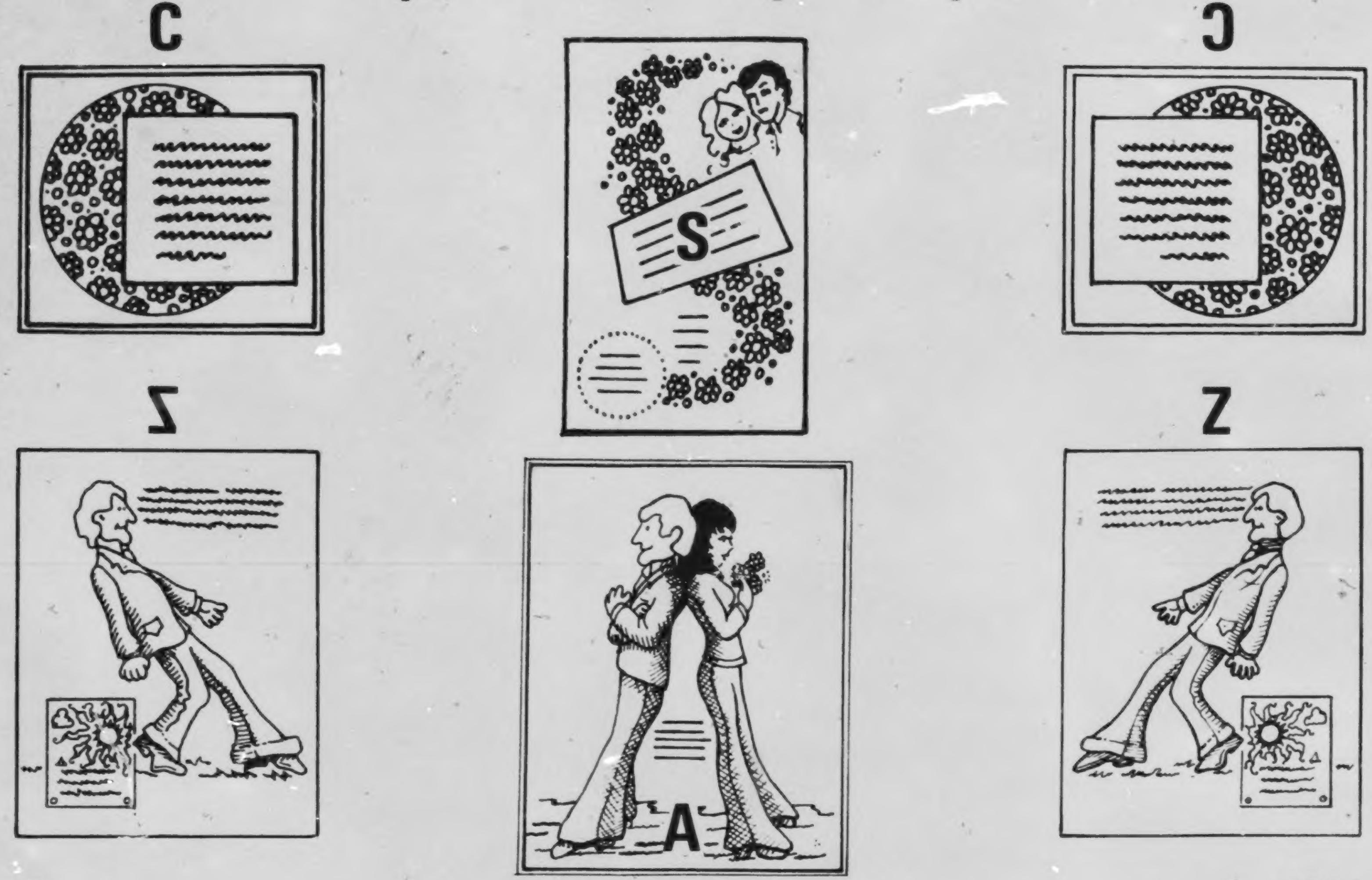
Use Simple Panel Forms to Assure White Space

Four-Point Principle



....Elements of Layout are Allowed to Touch the Boundary Only Once on Each of the Four Sides

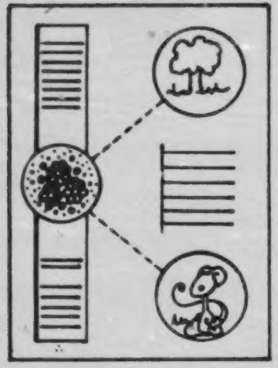
Layouts from Simple Shapes



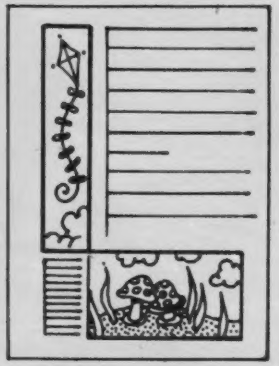
Layouts from Simple Shapes

(Continued)

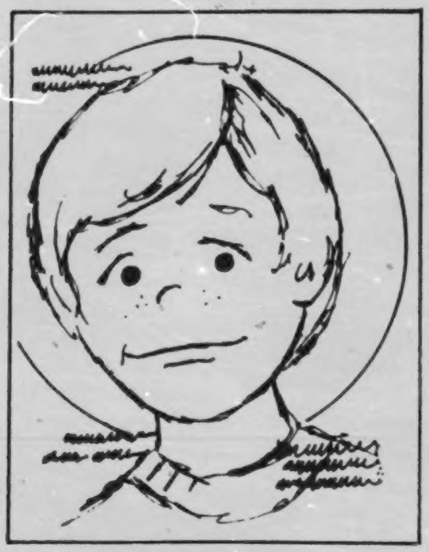
K



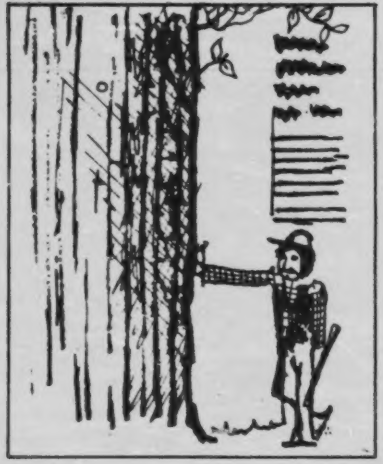
L



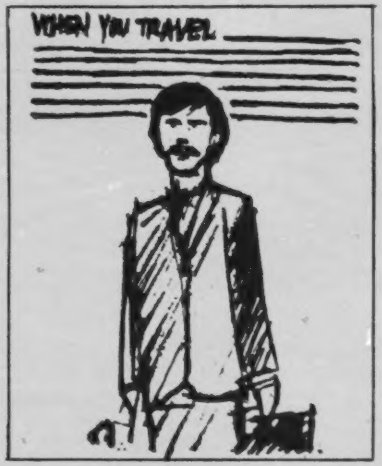
O



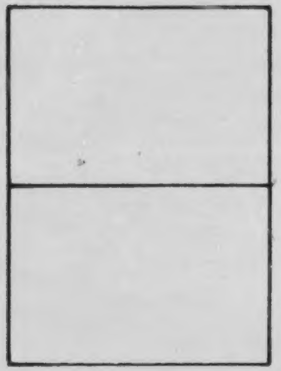
H



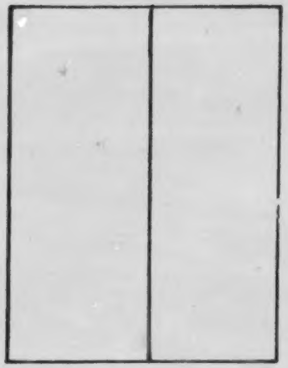
T


WHEN YOU TRAVEL

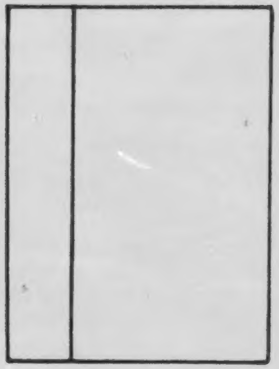
Proportion



The area is divided into two equal parts by a horizontal line. The line may be a drawn border or white space.



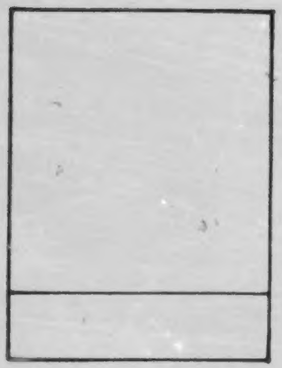
The area is divided into two equal vertical parts. Often the illustration is on one half and the other elements are on the other half.



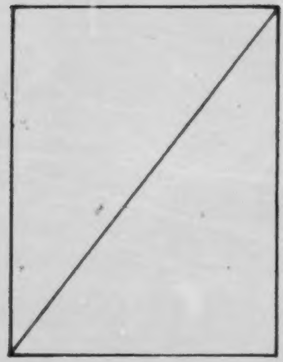
The ad is divided by about 1/5 and 4/5. This is used when related items can go with a major item featured.

Proportion

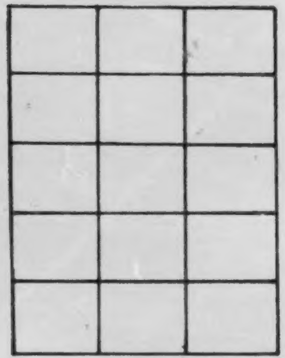
(Continued)



A horizontal line at either top or bottom makes a division of about 1/4 and 3/4. A bottom division is usually preferred.

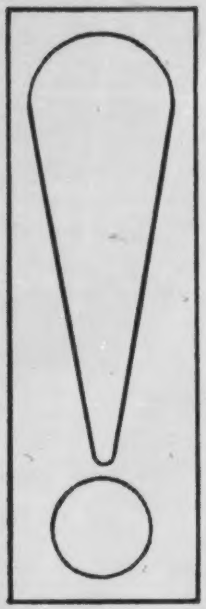


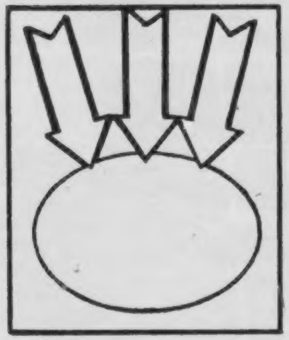
A diagonal line divides the space into halves. This is used when illustrations are tall.

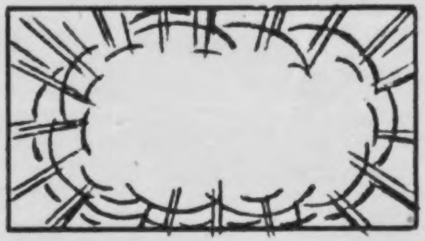


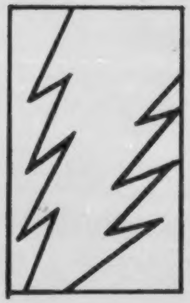
Several vertical and horizontal lines are drawn to make 6, 8, 12, or more areas. This is used in omnibus advertisements which include many items that may not be related.

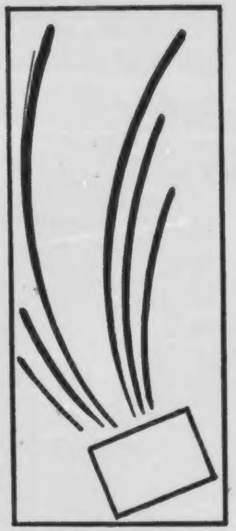
Attention-Getters

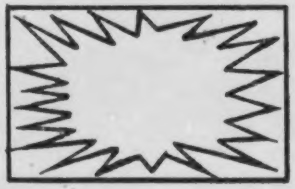


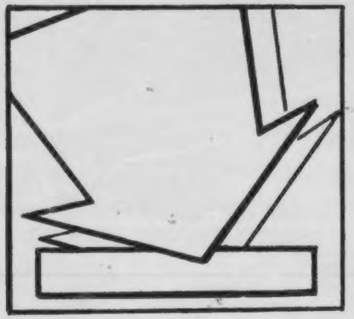


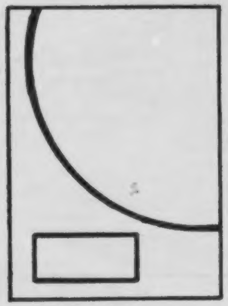


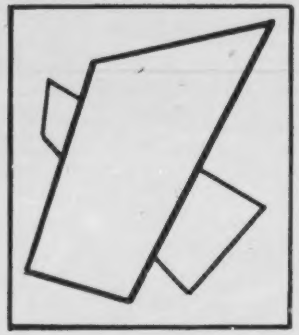


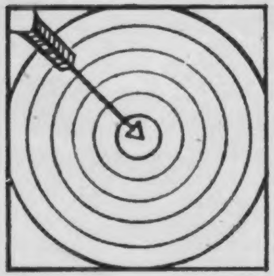






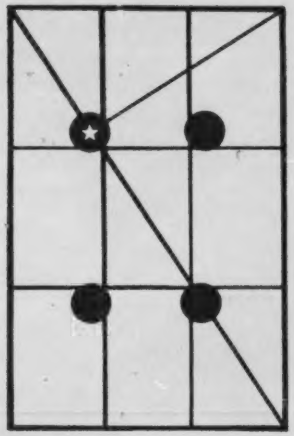




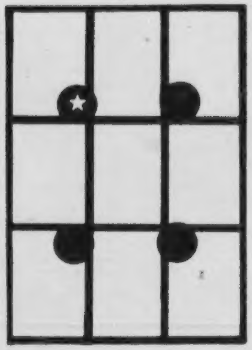


Make Ads 'Leap' From Page

Focal Points

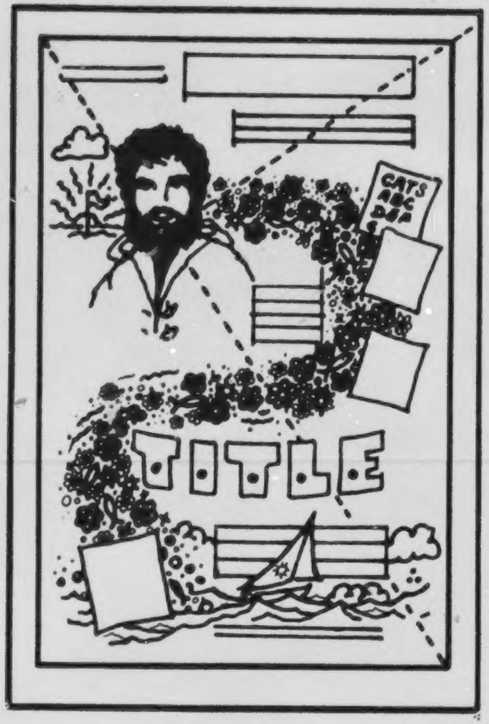


Point ✪: Marks the Prime Focal Interest.
Others are Secondary in Visual Appeal.



Divide Sides Into Thirds
....For Quick Approximate Position

Focal Point Used in Layout

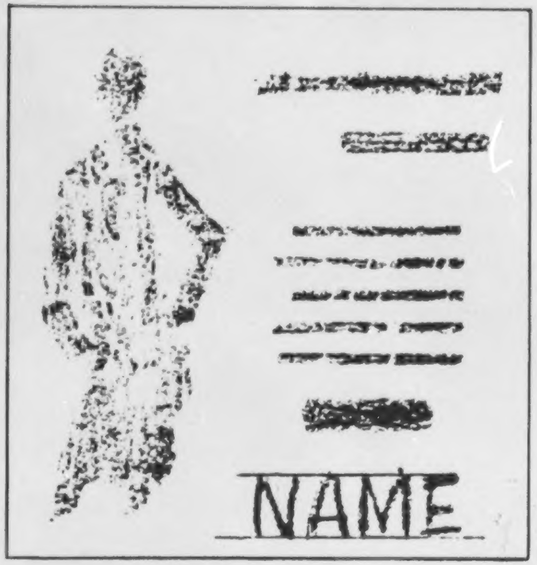


Here We Use the Primary Focal Point to Begin the Development of a Reverse S Curve - Thus Leading the Eye Naturally Through the Advertising Copy

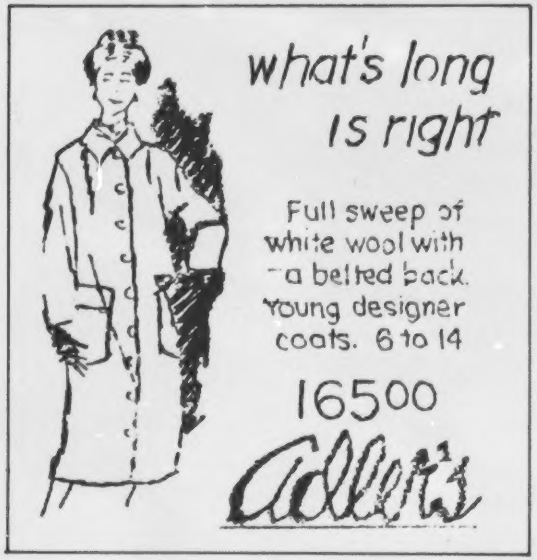
TM 19

DE II - 97-F

Development Stages



Thumbnail Sketch

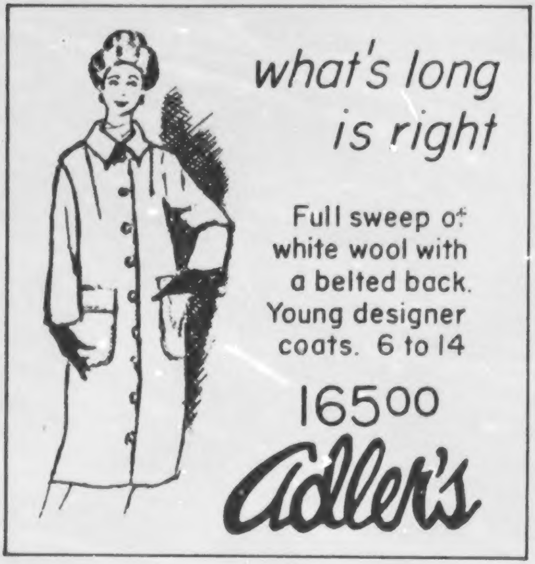

what's long
is right
16500
Adler's

Full sweep of white wool with a belted back. Young designer coats. 6 to 14

Rough Draft

Development Stages

(Continued)



what's long
is right

Full sweep of
white wool with
a belted back.
Young designer
coats. 6 to 14

165^{00}

Adler's

Comprehensive Layout

ADVERTISING LAYOUT
UNIT II

ASSIGNMENT SHEET #1--CONSTRUCT AN AD LAYOUT

Make a rough draft of an ad layout using the DECA ad layout sheets provided. You may advertise your business and your products and/or use the products and illustrations included in this assignment. You may combine several products in one ad if desired.

(NOTE: The accompanying illustrations for the copy below will be found on the following pages.)

1. Electric range--30 inches wide; oven light; oven window; lift-up cook top for easy cleaning; food warmer; clock; one-hour timer; storage drawer; broiler; white, avocado, or gold colors; $309.95 (Figure 1)

2. Recliner--Brown or gold vinyl; $91.95 (Figure 2)

3. Electronic calculator--Large 1/2 inch numbers; 12 digits; four memory keys; black plastic; leather-look side panels; full one-year warranty; $69.85 (Figure 3)

4. Eight piece Corning Ware cookware set--Set includes 1 qt saucepan, skillet, 4 qt saucepan, 4 qt saucepot, four Pyrex glass covers; $54.80; black handle fits all pans; $4.50 (Figure 4)

5. Turtleneck pullovers--Back zipper opening; rib-knit acrylic; machine washable; sizes 34-42; pink, orange, navy blue, white, brown, red, green; $4.99 (Figure 5)

6. Tailored slip--Anti-cling tricot; front shadow panel; cord-stitching trim; adjustable straps; machine washable; white; $6.00 (Figure 6)

7. Men's pile-lined poplin coat--Quilted sleeve lining; dry clean only; sizes 38-46; $29.88 regular price; on sale for $19.88 (Figure 7)

8. Men's boots--Full-grain glove leather upper; oil-resistant, nonmarking rubber sole; fully leather lined; steel shank for firm arch support; leather pull straps; 11 inches high; sizes 7-14; all D width; black or brown colors; $30.97 (Figure 8)

9. Women's casual shoe--Hand-sewn; 1 1/2 inch high wedge heel; crepe rubber sole and heel; brown, black, tan, or navy colors; $12.95 (Figure 9)

10. Socks--Ribbed nylon; one size fits sizes 8 1/2-11; green, navy blue, red, white, black, or brown colors; $.87 a pair or 3 pair for $1.25 (Figure 10)

FIGURE 1

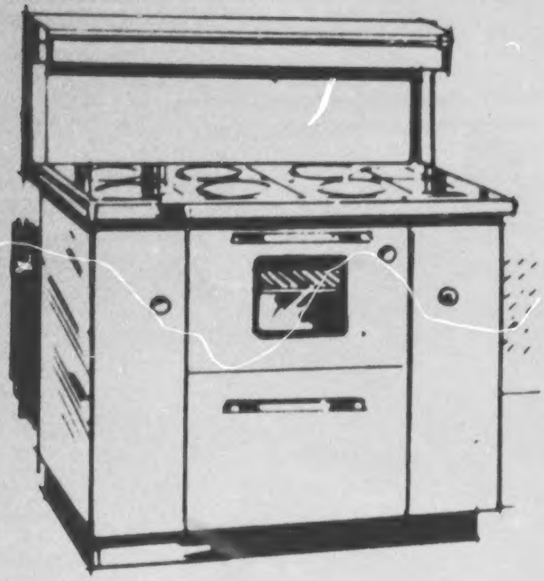


FIGURE 2

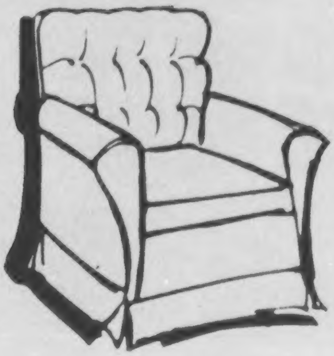


FIGURE 4

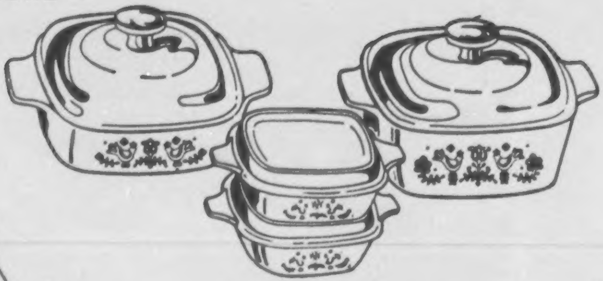
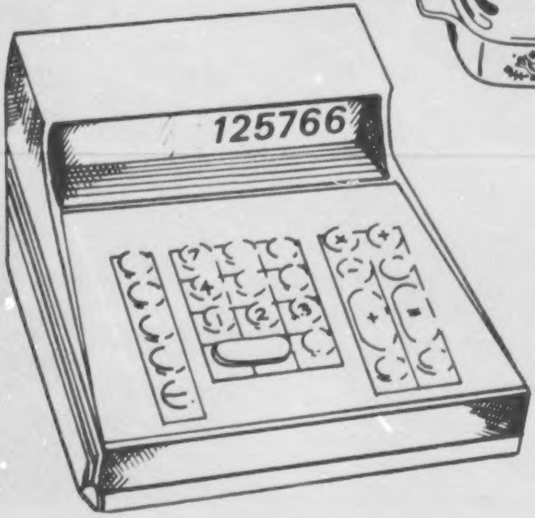


FIGURE 3



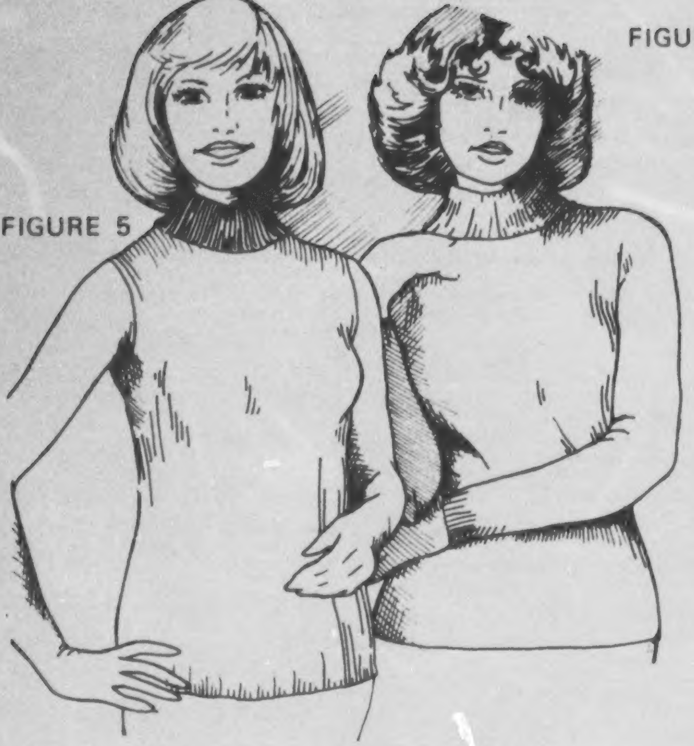


FIGURE 5

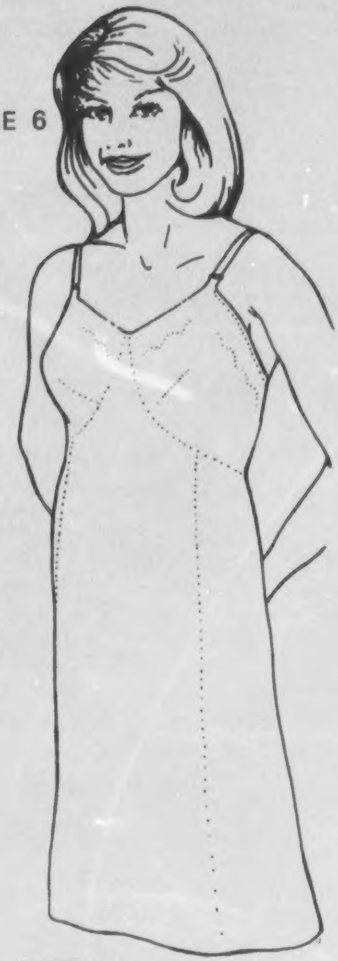


FIGURE 6

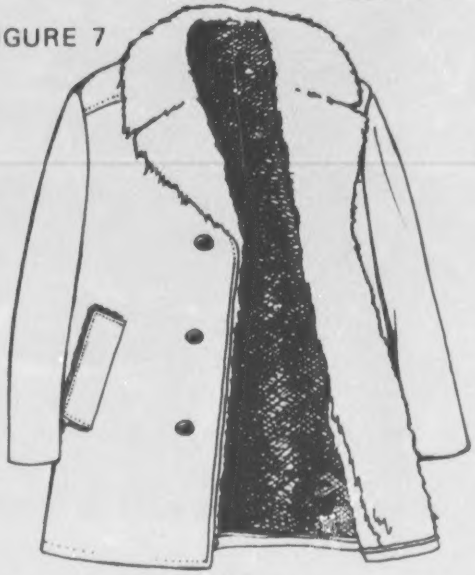


FIGURE 7

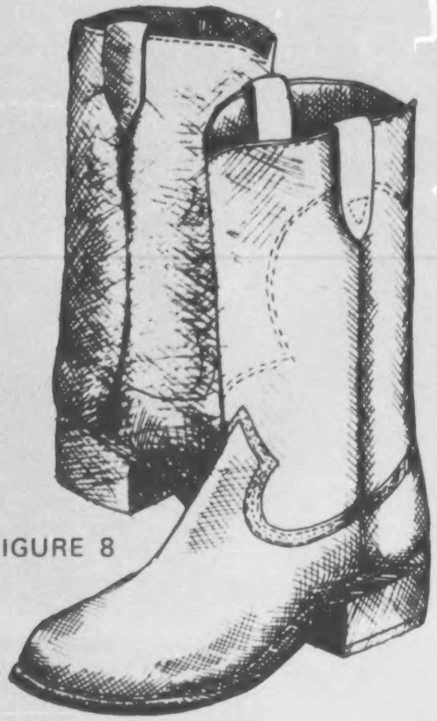


FIGURE 8

FIGURE 9

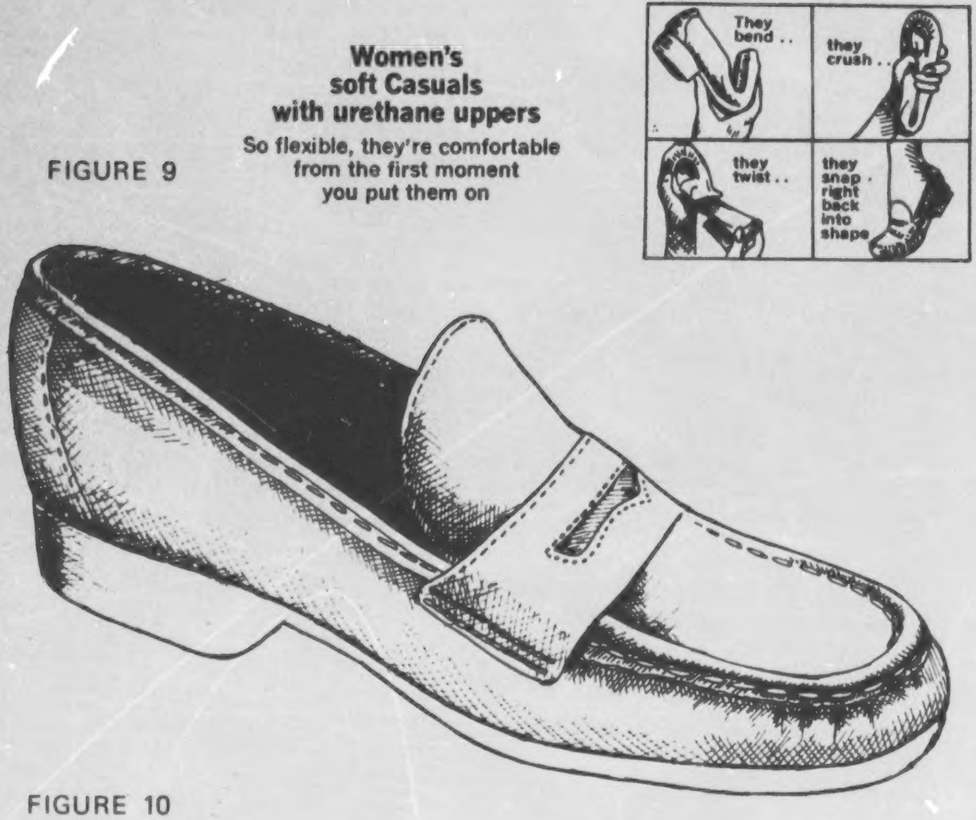
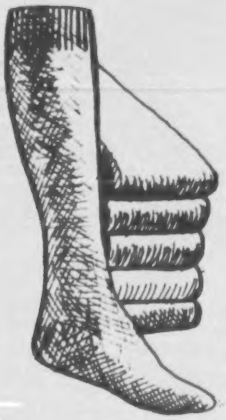

Women's
soft Casuals
with urethane uppers
So flexible, they're comfortable
from the first moment
you put them on
They bend . .
they crush . .
they twist . .
they snap . right back into shape

FIGURE 10



DECA Ad Layout Sheet

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10

ADVERTISING LAYOUT
UNIT II

ASSIGNMENT SHEET #2--JUDGE AN AD LAYOUT

After completing your ad layout, ask your classmates to judge the attractiveness and "sales-ability" of the ad using the rating sheet below. The rating sheet may also be used to judge other ads brought to class for discussion.

RATING SHEET

		High Degree	Medium Degree	Low Degree
1.	Is the ad centered at its optical center?			
2.	Is the ad balanced?			
3.	Will it catch the customer's attention?			
4.	Does it stress "you" and "yours"?			
5.	Does the headline cause the customer to want to read the rest of the ad?			
6.	Does the layout direct the eye smoothly from the top of the ad, through the center, and to the bottom of the ad?			
7.	Does the ad appeal to customer's buying motives?			
8.	Does the ad sell customer benefits?			
9.	Is it easy to read?			
10.	Is it timely?			
11.	Does it use action verbs and other persuasive selling words wisely?			
12.	Does its style make it easily recognized as the store's ad before seeing the logotype?			
13.	Does it contain all necessary store information?			
14.	Does it urge the customer to buy now?			
15.	Does it give a reason for shopping in the store?			

ASSIGNMENT SHEET #2

		High Degree	Medium Degree	Low Degree
16.	Does the ad use specific descriptions?			
17.	Are the type faces expressive without being distracting?			
18.	Do the illustrations guide the reader's attention to the message?			
19.	Is white space used wisely?			
20.	Is each element of the ad in proportion and harmony with the other elements?			
21.	Are attention-getters used?			
22.	Are the focal points used wisely?			
23.	Does it sell the product(s) or the store?			

ADVERTISING LAYOUT
UNIT II

TEST

1. Match the terms on the right to the correct definitions by placing the appropriate numbers in the blanks provided.

______a. Arrangement of copy and illustrations on the printed page

______b. Words and printed material on an advertisement

______c. Elements are not the same on both sides but balance is obtained by varying the distance of larger, heavier elements from the center

______d. Elements spaced evenly on both sides of an ad

______e. Spot within a rectangle where the eye naturally pauses

______f. Point a little above the actual measured center

______g. Papier-mâché mold often furnished by a company or manufacturer; used to engrave some advertisements

______h. Copy of an advertisement which is given to the advertiser to be checked for errors before being printed

______i. Unprinted areas within the borders of an advertisement

______j. Name or symbol of the store or company

______k. Advertisement that contains a variety of unrelated items

______l. Book supplied by printing shops and newspapers from which advertisers may select illustrations of all sizes and brand names

______m. Style of letters

1. Informal balance
2. Formal balance
3. Layout
4. Copy
5. White space
6. Focal point
7. Logotype (signature cut)
8. Mat (matrix)
9. Proof
10. Omnibus advertising
11. Optical center
12. Slick book (clip art)
13. Type face

2. List the major parts of an advertising layout.

a.

b.

c.

d.

e.

f.

g.

h.

3. Select from the following list true statements about the characteristics of a good headline. Place an "X" in the correct blanks.

_____a. Catches prospective customer's attention

_____b. Stresses "I," "me," "my"

_____c. Arouses curiosity

_____d. Sounds like exciting news

_____e. Leads prospective customer to read the rest of the ad

_____f. Does not need to indicate the content of the ad

_____g. Stresses customer benefits

_____h. Appeals to customer's buying motives

_____i. Is always honest

_____j. Is easy to read

_____k. Is written in straight lines with the words reading from left to right

_____l. Includes complete punctuation

_____m. May use hyphenated words

_____n. Uses white letters on a black background quite frequently

_____o. Uses several headlines in an ad

______p. Is timely

______q. Uses action verbs

______r. Uses persuasive selling words

______s. Is easily recognized as the store's ad before seeing the logotype because of the ad's entire effect or style

4. Select from the following list purposes of subheadings. Place an "X" in the correct blanks.

______a. Breaks monotony

______b. Explains the headline further

______c. Gives clues to the main points covered in each block of copy

______d. Helps the reader choose those parts of the ad in which he/she is most interested

5. Select from the following list true statements about the characteristics of good copy. Place an "X" in the correct blanks.

______a. Gives the reason for buying the product (buying motives and customer benefits)

______b. Gives the reason for shopping in the store

______c. Urges the reader to buy now

______d. Uses many common clichés

______e. Uses many abbreviations to conserve space

______f. Uses specific descriptions

______g. Includes important store information

______h. Sounds enthusiastic

______i. Is informative

______j. Is fun to read

______k. Uses many different kinds of type faces

______l. Uses mostly incomplete sentences

______m. May begin with bold letters

6. Select from the following list true statements about illustrations.

______a. Present merchandise effectively

______b. Guide reader's attention to the advertising message

______c. Should have all related items priced

______d. May be the dominant attention-getter for the ad

7. Select from the following list factors which determine the best location for an ad in the newspaper. Place an "X" in the correct blanks.

______a. Inside edge of page

______b. Next to reading material

______c. In a particular section of the newspaper that is widely read by prospective customers

8. Name the factors to remember when selecting color for an ad.

a.

b.

9. List ways to assure wise use of white space in an ad.

a.

b.

c.

10. Select from the following list true statements about layout design. Place an "X" in the correct blanks.

______a. Should direct the eye smoothly from the top of the ad, through the center, and to the bottom of the ad

______b. Often follow the shapes of letters of the alphabet

______c. Should keep each element in the ad in proportion and harmony with the other elements

______d. May use attention-getters

11. Identify the main focal point on the following diagram by placing an "X" on the correct spot.

12. Match the stages in developing an ad layout on the right to their correct descriptions. Place the appropriate numbers in the blanks provided.

_____a. Best thumbnail sketches enlarged and drawn a number of times until all the elements are the exact size and position

_____b. Traced from the rough layout with enough detail added to show how the finished advertisement will look

_____c. Small outline with a few lines and shapes to show the placement of the headline, copy, illustration, and logotype

1. Rough draft
2. Thumbnail sketch
3. Comprehensive (semi-comprehensive or semi-comp)

13. Select from the list below true statements about a sale ad. Place an "X" in the correct blanks.

_____a. Should stress savings alone

_____b. Need not give a reason for the sale

_____c. May emphasize price or the savings by comparing the sale price to the original

14. Construct an ad layout.

15. Judge an ad layout.

(NOTE: If activities 14 and 15 have not been accomplished prior to the test, ask your DE teacher-coordinator when they should be completed.)

ADVERTISING LAYOUT
UNIT II

ANSWERS TO TEST

1. a. 3
   b. 4
   c. 1
   d. 2
   e. 6
   f. 11
   g. 8
   h. 9
   i. 5
   j. 7
   k. 10
   l. 12
   m. 13

2. a. Headline
   b. Subheading
   c. Copy
   d. Illustration
   e. White space
   f. Border
   g. Type face
   h. Logotype

3. a, c, d, e, g, h, i, j, k, p, q, r, s

4. a, b, c, d

5. a, b, c, f, g, h, i, j, m

6. a, b, c, d

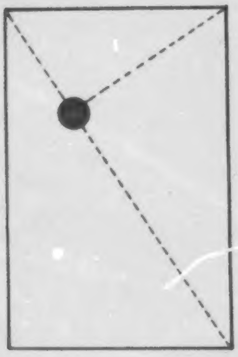
7. b, c

8. a. Use only if it dramatizes the merchandise and increases sales enough to justify the additional cost
   b. Use only the purest and brightest colors

9. a. Indent from the thin column border before beginning the ad's border
   b. Use simple panel forms to help group information
   c. Allow elements of the layout to touch the boundry only once on each of the four sides

10. a, b, c, d

11.



12. a. 1

    b. 3

    c. 2

13. c

14. Evaluated to the satisfaction of the teacher-coordinator

15. Evaluated to the satisfaction of the teacher-coordinator

MERCHANDISING
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to list factors to consider before buying merchandise for resale and select from a list items used to analyze a business's performance. The student should also be able to arrange in order the steps in taking a physical inventory and to compute average inventory. He/she should be able to compute basic business math problems related to stock turnover, stock-sales ratio, pricing, open-to-buy, discounts, and shipping. He/she should be able to complete a profit and loss statement and list categories of operating expenses for a business. This knowledge will be evidenced by a score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with merchandising to the correct definitions.
2. Distinguish between operations/merchandising duties and sales promotion duties in a business.
3. List factors to consider before buying merchandise for resale.
4. Select from a list items used to analyze a business's performance.
5. Compute inventory using retail prices and cost codes.
6. Arrange in order the steps in taking a physical inventory.
7. Define types of perpetual inventory systems.
8. Compute average inventory.
9. Compute stock turnover in terms of physical units and on a dollar basis.
10. Compute stock-sales ratio.
11. Compute open-to-buy.
12. Match discount and shipping terms to descriptions of each.
13. List factors affecting prices.

14. Apply formulas used in pricing merchandise.
15. List categories of operating expenses for a business.
16. Complete a profit and loss statement.
17. Complete a diagnostic test of basic business math to discover areas which need further study.

MERCHANDISING
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

   A. Give pretest using objective sheet.

   B. Provide student with objective sheet.

   C. Provide student with information and assignment sheets.

   D. Role play taking inventory.

   E. Arrange for students to see various ways of printing tickets and marking merchandise through guest speakers, field trips, or class demonstrations.

   F. Make transparencies.

   G. Discuss unit and specific objectives.

   H. Discuss information and assignment sheets.

   I. Give test.

   J. Reteach if necessary.

   K. Test again until minimum standard is reached.

II. Student:

   A. Read objective sheet.

   B. Study information sheet.

   C. Take notes.

   D. Complete assignment sheets.

   E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

C. Transparency masters

1. TM 1--Purchase Order
2. TM 2--Cost Codes
3. TM 3--Perpetual Inventory Card
4. TM 4--Want Slip
5. TM 5--Stages of the Fashion Cycle
6. TM 6--Operating Expenses

D. Assignment sheets

1. Assignment Sheet #1--Compute Inventory
2. Assignment Sheet #2--Compute Average Inventory
3. Assignment Sheet #3--Compute Stock Turnover
4. Assignment Sheet #4--Compute Stock-Sales Ratio
5. Assignment Sheet #5--Compute Open-to-Buy
6. Assignment Sheet #6--Figure Discounts and Shipping Costs
7. Assignment Sheet #7--Price Merchandise
8. Assignment Sheet #8--Complete Profit and Loss Statements
9. Assignment Sheet #9--Complete Basic Business Math Diagnostic Test

E. Test

F. Answers to test

II. References:

A. Shilt, Bernard A.; Carmichael, D. L.; and Wilson, W. Harman. *Business Principles and Management.* Dallas: South-Western Publishing Co., 1967.

B. Wingate, John W., and Samson, Harland E. *Retail Merchandising.* Dallas: South-Western Publishing Co., 1975.

MERCHANDISING
UNIT I

INFORMATION SHEET

I. Terms and definitions

A. Comparison shopping--Shopping in other stores to study the types, quality, and prices of merchandise being offered by competitors in comparison with one's own store

B. Purchase order--Form used to order merchandise from the manufacturer or wholesaler (Transparency 1)

C. Invoice--List of goods shipped, stating quantities, prices, and shipping charges

D. Break-even point--Volume of sales where the revenue received covers costs and all future sales represent profit

Example:	$8000	Cost of goods sold
	700	Fixed costs
	900	Variable costs
	$9600	Break-even point for volume of sales

(NOTE: Break-even point for an item would be the price at which costs are covered and any increase in price represents profit.)

Example:	$20.00	Cost per item
	1.60	Fixed cost
	4.75	Variable costs
	$26.35	Break-even point for item

E. Cost code--Way cost of merchandise is placed on the sales ticket for inventory and other planning and control functions (Transparency 2)

(NOTE: The cost is placed in code so customers who generally do not understand all about business expenses will not get the wrong impression.)

F. Physical inventory--Actual count of the goods in stock, usually taken two to four times a year

G. Perpetual inventory system--Record kept of each item showing the amount of merchandise put in stock, withdrawn, and on hand at any particular time without the necessity of taking a physical count (Transparency 3)

H. Stock count--Counting items before advertising or re-ordering

(NOTE: The stock count is often done during slack periods to avoid inconveniencing or ignoring customers.)

INFORMATION SHEET

I. Turnover--Number of times during a given period that the average amount of stock on hand is sold and replaced

(NOTE: The time period for figuring turnover is usually for one year. Turnover can be expressed in either units or dollars. It is helpful to compare turnover rates with the rates of other years and similar departments. The National Retail Merchants Association publishes a book containing operating figures for past years for various departments in retailing. Profit can be increased by increasing turnover without an equal or larger increase in operating expenses.)

J. Ratio--Relationship in amount or size between two or more things

K. Stock-sales ratio--Relationship of retail stock to the sales for that month

(NOTE: This allows a department to figure how much stock it will need in order to meet planned sales for the month and still leave merchandise at the end of the month for the next month's B.O.M. [beginning of month] stock.)

Example: A stock-sales ratio of 3:1 means there is three times as much stock at the beginning of the month as sales for the month

L. Open-to-buy--Amount of money left during a given period to purchase merchandise without going over the planned inventory

Example: If a business had $2000 open-to-buy for the remainder of the month, it would mean that the business could purchase $2000 worth of merchandise and still not go over the planned inventory

M. Want slip (want list)--Form on which salespeople may write down merchandise asked for but which is not in stock at the present time (Transparency 4)

N. Basic stock list--List of merchandise that is to be kept in stock at all times

O. Staple goods--Merchandise that is always kept in stock

P. Fashion goods--New goods with a relatively short life span but which are of temporary interest to many people (Transparency 5)

Q. Private brands--Products made with the trademark of retailers or wholesalers

INFORMATION SHEET

R. National brands--Products made with the trademark of manufacturers or producers

S. Dating--Time limits on payment of purchases

T. C.O.D. (cash on delivery)--Merchandise which must be paid for at time of delivery

U. Gross margin (maintained margin)--Difference between net sales and cost of goods sold

V. List price--Retail price paid by consumer; sometimes suggested by the manufacturer

W. Markup (mark-on, initial markup)--Amount added to the cost of goods to arrive at the original selling price

X. Markdown--Reduction of selling price to a lower price

Y. Unit pricing--Price per item

Z. Multiple pricing--Pricing merchandise in groups; gives the appearance of a bargain

(NOTE: A larger profit may result because more merchandise is sold without increasing the cost of handling the merchandise.)

AA. Revenue--Income from an investment

BB. Gross--Overall total before deductions are subtracted

CC. Net--What is left after all expenses and losses are deducted

DD. Gross sales--Total amount of goods or services sold

EE. Net sales--Gross sales less any returns or adjustments

FF. Cost of goods sold--Amount paid for merchandise, including all shipping costs

GG. Operating expenses (overhead)--Costs of running a business, not directly related to the merchandise sold

Examples: Rent, payroll, utilities, advertising, supplies and equipment, buyer's traveling expenses, donations, bad accounts, theft, bookkeeping, insurance, repairs, maintenance, and depreciation

HH. Budget--Estimate of income and expenses for various operations

INFORMATION SHEET

II. Fixed costs (flat expenses)--Expenses that are about the same for every article regardless of its cost or selling price

Examples: Receiving, marking, wrapping, delivery

JJ. Variable costs--Expenses that are different for each item but are approximately the same percentage of the selling price

Examples: Salespersons' commissions, advertising, insurance, interest, cost

KK. Net profit--Amount of money left after payment of all costs and expenses other than income taxes

LL. Trademark (brand)--Word, mark, and/or symbol used to identify a product or service

MM. Memo--Informal written reminder

II. Duties within a business which help build sales and profits

(NOTE: All these duties require an awareness of customers' likes and dislikes; a knowledge of the quantity, quality, and care of the products; a knowledge of the factors which affect costs and profits; a knowledge of competitors; and accuracy in performing the duties. This unit will deal with the operations and merchandising duties in particular.)

A. Operations/merchandising duties

1. Buying
2. Receiving and checking merchandise
3. Marking merchandise
4. Pricing
5. Stockkeeping
6. Providing customer services, returns, and adjustments

   Examples: Wrapping, delivery, handling

B. Sales promotion duties

1. Advertising
2. Display

INFORMATION SHEET

3. Personal selling
4. Special promotional activities

   Examples: Parades, fashion shows, baking contests, clowns giving away balloons to children

III. Factors to consider before buying merchandise for resale

A. Figures from previous year

   1. Sales records
   2. Stock records
   3. Purchase orders
   4. Markups
   5. Markdowns

B. What merchandise was selling well in a particular recent month

C. Business conditions

   Examples: Employment situation and price levels

D. Styles that may change rapidly (Transparency 5)

E. Whether the department or business is growing or holding its own

F. Shipping conditions

   1. Length of time before merchandise can be received
   2. Number of regularly scheduled deliveries
   3. Condition in which merchandise will arrive
   4. Cost of shipping

G. Competition's activities

H. Turnover rate

I. Seasonal fluctuations

J. Special events to be observed

   Examples: Anniversary, Founder's Day, George Washington's birthday

INFORMATION SHEET

IV. Items used to analyze a business's performance

   A. Sales records

      Example: Charge accounts which accurately show styles, colors, prices, and quantities

      (NOTE: Customer tastes for staples and convenience items change more slowly than shopping goods, fads, and specialty items.)

   B. Customers (Transparency 4)

      (NOTE: Many businesses keep a file of want lists so they will remember what customers say they need but is not in stock. Also, some clothing stores appoint customers to fashion boards to offer recommendations and to model apparel in fashion shows.)

   C. Comparison shopping

      Examples: Observing displays and advertisements of local competitors and competitors in neighboring towns and large cities or maybe even having employees act as customers in competing stores

   D. Surveys of customers

   E. Talks with sales representatives

      (NOTE: Sales representatives are familiar with new product developments, what other stores are doing, market trends, and comparative prices.)

   F. Trade journals and papers

   G. Inventory records

V. Recording inventory at cost (Assignment Sheet #1)

   A. Using retail prices

      1. Record the retail prices of merchandise

      2. Multiply the retail price of each item in stock by the number of articles on hand at the time of the inventory

      3. Add the total retail value for each item to arrive at the total inventory at retail

INFORMATION SHEET

4. Multiply the total inventory retail value by the markup percentage to arrive at the total markup

5. Subtract the total markup from the total inventory at retail value to arrive at the total inventory at cost

   Example:

20 items selling for $2.00 each	=	$ 40.00
50 items selling for $5.00 each	=	$250.00
40 items selling for $1.00 each	=	$ 40.00
Total inventory at retail	=	$330.00

   $330
   x .25 (25% markup)
   1650
   660
   $82.50 Total markup

$330.00	Total inventory at retail
- 82.50	Total markup
$247.50	Total inventory at cost

B. Using cost codes

1. Record the costs of merchandise taken from the cost codes on the price tags

2. Multiply the cost of each item in stock by the number of articles on hand at the time of the inventory

3. Add the total costs for each item to arrive at the total inventory at cost

Example:	20 items costing $ 2.00 each	=	$ 40.00
	20 items costing $ 5.00 each	=	$100.00
	30 items costing $10.00 each	=	$300.00
	Total inventory at cost		$440.00

VI. Steps in taking a physical inventory

A. Form a team consisting of a checker and a caller

B. Divide the store according to its layout or established departments

C. Group merchandise according to price, type, and style

INFORMATION SHEET

D. Have caller give out information to the checker

Examples: Article, time purchased, quantity, retail or cost price

E. Have checker record information on an inventory form

F. Have caller look occasionally to see if checker is recording information accurately

VII. Types of perpetual inventory systems

(NOTE: These systems have an influence on stocking procedure. The items to be sold first would be moved to the front of shelves and the top of stacks.)

A. FIFO (First In First Out)--First items placed in stock are the first ones taken out

(NOTE: This is the most common method.)

B. LIFO (Last In First Out)--Newest items placed in stock are the first ones taken out

VIII. Average inventory (Assignment Sheet #2)

A. Add the opening inventories for each month of the year to the closing inventory of the period

(NOTE: This may be done using retail value or actual number of units.)

Example:	January 1	$ 2,198
	February 1	2,300
	March 1	2,497
	April 1	2,500
	May 1	2,500
	June 1	2,000
	July 1	2,250
	August 1	2,099
	September 1	2,100
	October 1	2,700
	November 1	2,600
	December 1	2,598
	December 31	2,000
		$30,342

B. Divide the total monthly figures by 13 for the average inventory

Example: $\frac{\$30,342}{13} = \$2,334$

INFORMATION SHEET

IX. Stock turnover formulas (Assignment Sheet #3)

A. In terms of physical units

$$\frac{\text{Number of units sold}}{\text{Average inventory in units}} = \text{Rate of stock turnover}$$

Example: If 2,000 books were sold during the year and number of books in stock was 1,000, the rate of stock turnover is 2

$$\frac{2{,}000}{1{,}000} = 2$$

B. On a dollar basis

$$\frac{\text{Net sales in dollars}}{\text{Average dollar value of stock}} = \text{Rate of stock turnover}$$

Example: If $10,000 worth of books were purchased during the year and an average of $5,000 worth of books were kept in inventory, the store has an average stock turnover of 2

$$\frac{\$10{,}000}{\$\ 5{,}000} = 2$$

X. Stock-sales ratio (Assignment Sheet #4)

(NOTE: B.O.M. means beginning of month and E.O.M. means end of month. The amount of stock may be found in inventory records. The sales figures may be found in sales records.)

A. B.O.M. stock-sales ratio

$$= \frac{\text{B.O.M. stock at retail}}{\text{Sales for the month}}$$

Example: If the amount of stock at the beginning of the month is $20,000 and sales for the month are $5,000, the stock-sales ratio is 4:1 (four to one)

$$\frac{\$20{,}000}{\$\ 5{,}000} = \frac{4}{1} = 4:1$$

B. E.O.M. stock-sales ratio

$$= \frac{\text{E.O.M. stock at retail}}{\text{Sales for the month}}$$

Example: If the stock at the end of the month equals $10,000 and the sales for the month are $5,000, the stock-sales ratio is 2:1 (two to one)

$$\frac{\$10{,}000}{\$\ 5{,}000} = \frac{2}{1} = 2:1$$

INFORMATION SHEET

XI. Open-to-buy (Assignment Sheet #5)

A. Planned sales for the month and planned stock desired at the end of the month are added to arrive at the amount of stock needed during the month

(NOTE: The amount of stock for each major merchandise line is determined for a period of time, usually a month, based upon past sales.)

Example:	$6,000	Planned sales for the month
	+ 3,000	Desired stock at end of month
	$9,000	Total stock needed during the month

B. Amount of merchandise already in stock and the amount of merchandise already on order that will be delivered during the month are added to arrive at current stock

(NOTE: Time should be allowed for "lag time" or delays in getting merchandise to the stores.)

Example:	$2,000	Merchandise in stock at present time
	+ 500	Merchandise already on order
	$2,500	Current stock

C. Current stock is then subtracted from the total amount of stock needed to get the amount of stock which needs to be bought during the month

Example:	$9,000	Total amount of stock needed
	- 2,500	Current stock
	$6,500	Amount of stock to be bought (open-to-buy)

XII. Discount and shipping terms (Assignment Sheet #6)

(NOTE: It is advisable for businesses to take advantage of discounts from manufacturers because savings soon accumulate to a sizeable sum. Rather than lose the discounts, some businesses will borrow money from the bank to pay for the merchandise within the time period to get the discounts. Discounts and method of payment may be determined by the promptness in payment, services performed, or shipping methods.)

A. Cash discount--Deduction given if full payment is made early

Example: 2/10, n/30 means a 2% discount may be taken if the merchandise is paid for within 10 days from the date of the invoice. If the merchandise is not paid within 10 days, the net amount is due within 30 days of the invoice date

INFORMATION SHEET

B. Trade discount--Special deduction from the list price stated in catalogs

(NOTE: Changing the discount serves as a simple method of adjusting prices to retailers and wholesalers in a changing market. This is less complicated and less costly than frequently reprinting price lists and catalogs.)

C. Seasonal discount--Special discount offered those who place orders well in advance of the normal buying period

D. Promotional discount--Allowance for advertising the merchandise

E. Chain (series) discount--Two or more discounts deducted from the list price

(NOTE: These are deducted one at a time.)

Example: If a 10% trade discount and a 5% cash discount were allowed on a \$100 purchase the 10% discount would be subtracted from the \$100 leaving \$90 (\$100 x .10 = \$10, \$100 - \$10 = \$90). The 5% discount would be subtracted from the \$90 leaving the cost of the merchandise \$85.50 (\$90 x .05 = \$4.50, \$90 - \$4.50 = \$85.50)

F. E.O.M. (End of Month)--Amount must be paid by end of the month

Example: 3/10, n/30, E.O.M. means a 3% discount may be taken if the merchandise is paid for within 10 days after the end of the month of the date of the invoice. If the merchandise is not paid within this time, the net amount is due within 30 days after the end of the month in which the merchandise is invoiced

G. R.O.G. (Receipt of Goods)--Discount period not beginning until the day the merchandise is received by the store rather than beginning on the invoice date

Example: 2/10, n/30 R.O.G. means a 2% discount may be taken if the merchandise is paid for within 10 days of the date the goods are received in the store. If the merchandise is not paid within this time, the net amount is due within 30 days from the date the goods are received

H. Extra dating--Additional days, designated by an "X," given to the buyer before payment is due

Example: n/30, 60X means the total payment is not due for 90 days

INFORMATION SHEET

I. Advance dating (postdating)--Payment of merchandise computed from a date after the merchandise is shipped

(NOTE: This is done to encourage buying before the rush season begins.)

Example: Merchandise may be shipped in February but have a dating of May 4

J. F.O.B. (Free on Board)--Point in the transfer of merchandise where the person buying the merchandise begins paying the shipping costs

Example: "F.O.B. Chicago" means the shipping costs were paid by the manufacturer until the merchandise reached Chicago; the person buying the merchandise started paying the shipping costs from Chicago

K. Consignment--Merchandise remains the property of the seller and is paid for after it has been sold; any unsold merchandise may be returned to original seller if it is in good condition

(NOTE: Equipment may sometimes be bought on consignment. This is a less expensive way to begin a business. The term "on memorandum" is very similar to consignment selling except the buyer does own the title to the goods.)

XIII. Factors affecting prices

A. Cost of merchandise

B. Overhead expenses

C. Desired profit

XIV. Pricing formulas (Assignment Sheet #7)

(NOTE: The formulas will be found on the following page.)

INFORMATION SHEET

XIV. Pricing formulas (Assignment Sheet #7)

FORMULAS USED IN PRICING MERCHANDISE

Given	To Find	Procedure
Cost price, retail price	Markup in dollars	Subtract cost from retail
Markup in dollars, retail price	Cost price	Subtract markup from retail
Markup in dollars, cost price	Retail price	Add cost and markup
Retail price, markup in dollars	Markup percentage (retail)	Divide markup by retail
Cost price, markup in dollars	Markup percentage (cost)	Divide markup by cost
Cost price, original retail selling price	Initial markup	Subtract cost price from orginal retail selling price
Cost price, final sales price	Maintained markup	Subtract cost price from final sales price
Retail price, markup percentage	Cost price	Multiply retail price by (100% - M%)
Cost price, markup percentage	Retail price	Divide cost by (100% - M%)
Estimated expenses, profits, price reductions, sales	Initial markup	Add expenses, profits, and price reductions; divide this figure by (Sales + Reductions)
Original retail selling price, final sales price	Markdown	Subtract final sales price from original retail price
Dollar markdown, total sales	Markdown percentage	Divide dollar markdown by total sales

INFORMATION SHEET

XV. Categories of operating expenses for a business (Transparency 6)

A. Salaries and wages of all management, sales, and office employees

B. All types of advertising expenses

C. Depreciation on buildings, furniture, fixtures, and delivery equipment

D. Rent

E. Store supplies

Examples: Wrapping materials, bags, boxes, sales forms

F. Delivery expenses

Examples: Gas, oil, tires, maintenance

G. Communication expenses

Examples: Telephone and postage

H. Taxes on merchandise and personal property used in the business

Examples: City, state, and federal taxes

I. Repairs on buildings, fixtures, and equipment

J. Insurance

K. Traveling expenses to market, trade shows, and trade association conventions

L. Bad debt losses

Examples: Uncollectable charge accounts, bad checks

M. Donations

N. Membership dues in trade associations, chamber of commerce, professional and civic organizations

O. Miscellaneous

Examples: Legal fees, hiring and training expenses of new employees

INFORMATION SHEET

XVI. Profit and loss statement (operating statement) (Assignment Sheet #8)

A. Cost of goods sold must be subtracted from the net sales to arrive at the gross margin

B. Operating expenses must be subtracted from the gross margin to arrive at the net profit before income taxes

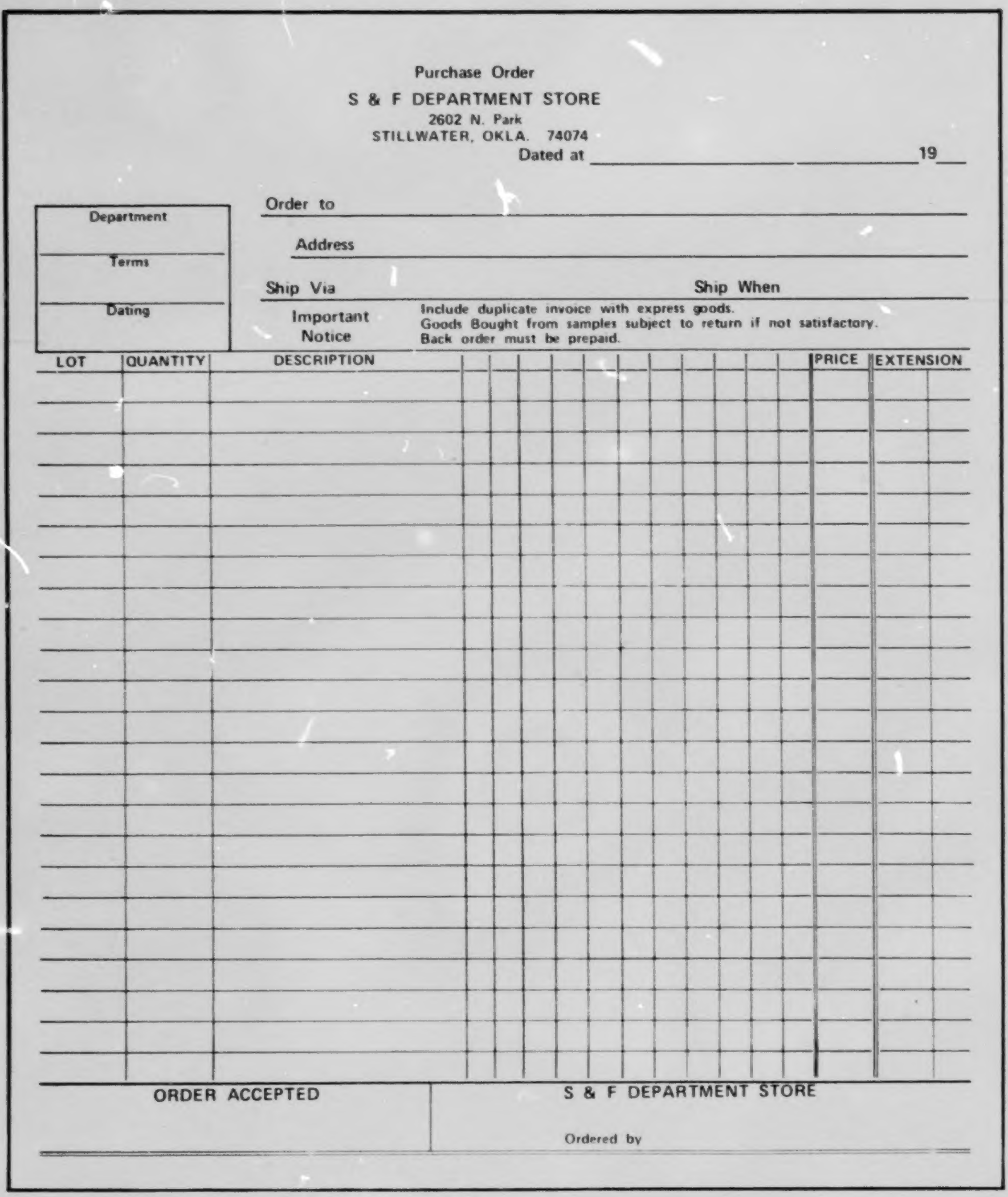
Example:

OPERATING STATEMENT

OPERATING STATEMENT, JANUARY 1 - DECEMBER 31, 1976

Net Sales	$300,000
Cost of Goods Sold	200,000
Gross Margin	$100,000
Operating Expenses	85,000
Net Profit Before Income Taxes	$ 15,000

Purchase Order



Purchase Order
S & F DEPARTMENT STORE
2602 N. Park
STILLWATER, OKLA. 74074
Dated at ______________________ 19___

Department
Terms
Dating

Order to
Address
Ship Via Ship When

Important Notice: Include duplicate invoice with express goods. Goods Bought from samples subject to return if not satisfactory. Back order must be prepaid.

LOT	QUANTITY	DESCRIPTION											PRICE	EXTENSION

ORDER ACCEPTED

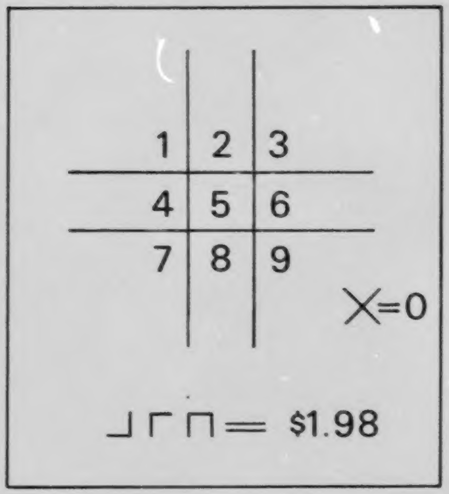
S & F DEPARTMENT STORE

Ordered by

Cost Codes

123456 7890
SPRING LAMB

SMA = $1.98


1 2 3
4 5 6
7 8 9
X=0
= $1.98

1234 567890
MAKE PROFIT

MIF = $1.98

Perpetual Inventory Card

PERPETUAL INVENTORY CARD

Item: Coveralls #292

Date	Pur. Req. or Stock Req. No.	Put in Stock	Withdrawn	Balance
4/4/--	325	600		600
4/10/--	1271		100	500
4/11/--	612		200	300
4/14/--	7700	1,000		1,300
5/10/--	033		350	950

Want Slip

Date ____________

Dept. No. ____________

Employee No. ____________

Want Slip

Keep this slip in your salesbook. Whenever an item is called for that is not in stock, whether carried regularly or not, record that fact at once. Make certain that you record every call. If the customer requested a special order, fill out the "Special Order Request."

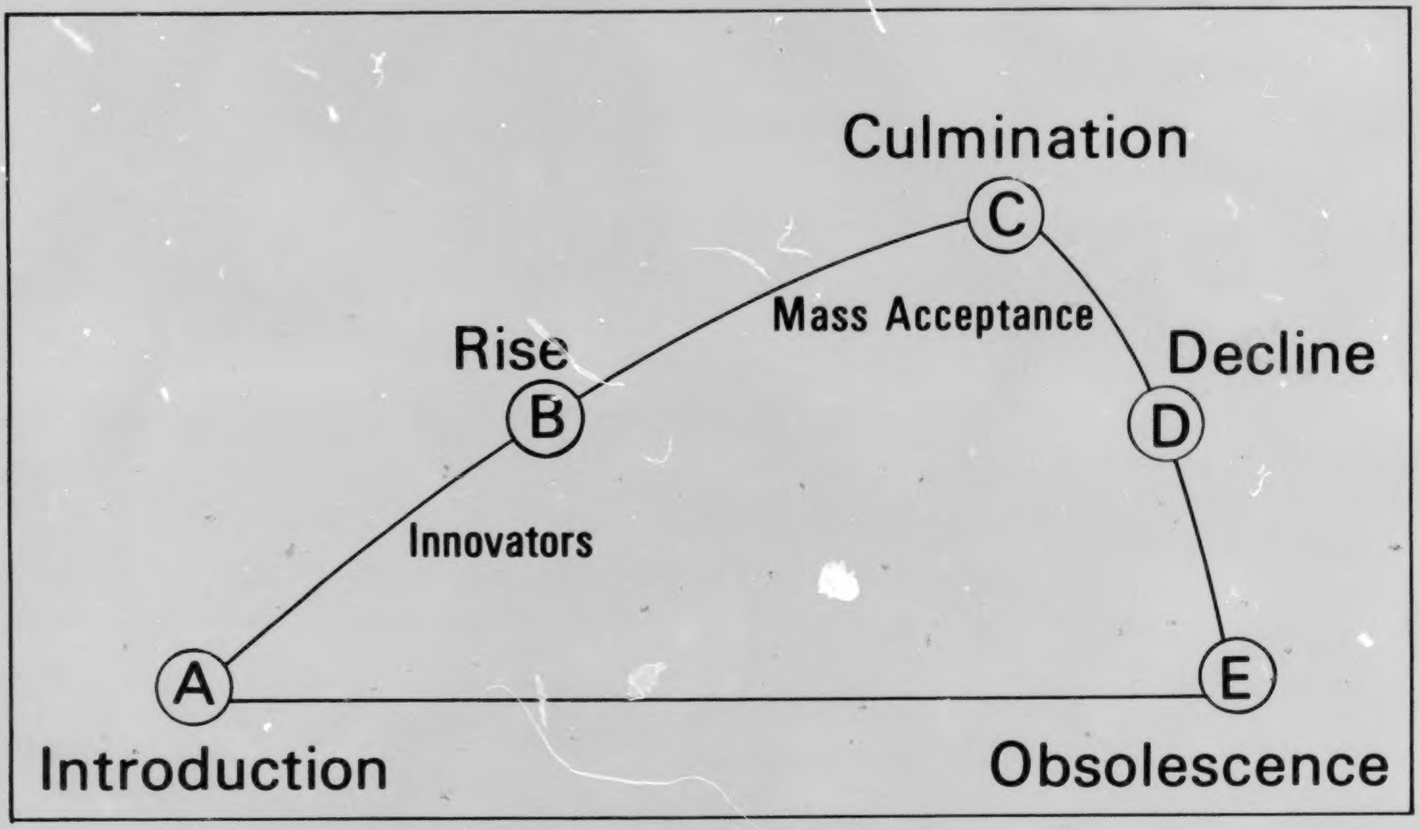
ITEM CALLED FOR	WANTED				Order Taken	Subst. Sold	Sale Lost	Buyer's Disposition
	Style	Color	Size	Price				

TO THE SALESPERSON: Write plainly, put one copy in the index and give one copy to your Department Manager.

TM 4

DE II - 27-G

Stages of the Fashion Cycle



Culmination

C

Mass Acceptance

Rise

B

Decline

D

Innovators

A

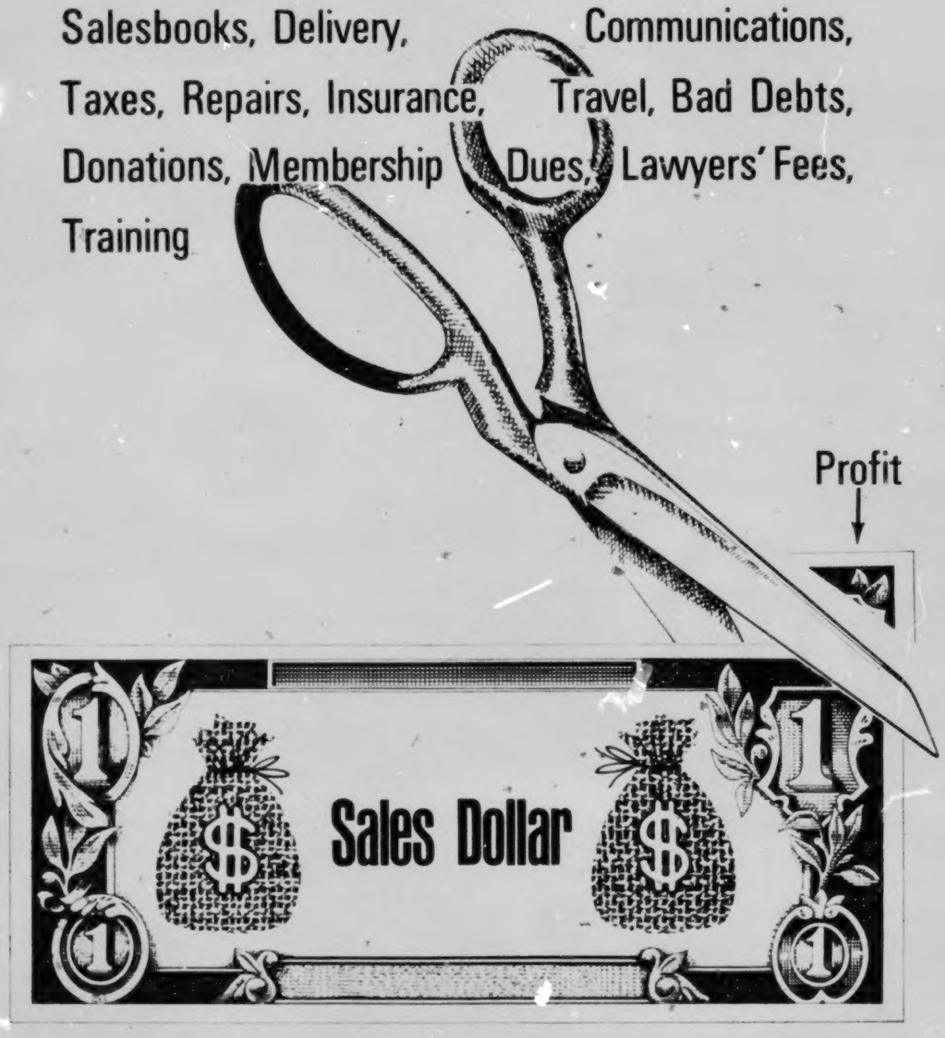
E

Introduction

Obsolescence

Operating Expenses

Salaries, Advertising, Depreciation, Rent, Sacks, Salesbooks, Delivery, Communications, Taxes, Repairs, Insurance, Travel, Bad Debts, Donations, Membership Dues, Lawyers' Fees, Training


Profit
1
1
$
Sales Dollar
$
1
1

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #1--COMPUTE INVENTORY

1. Given the following number of items and their retail prices, compute the total inventory. Markup is 25% of retail.

732 items @ $2.95
122 items @ $6.50
682 items @ $2.50
519 items @ $7.50
300 items @ $1.50

2. Given the following number of items and their costs, compute the total inventory.

230 items @ $2.50
120 items @ $5.00
262 items @ $2.50
154 items @ $5.75
300 items @ $1.00

3. Complete the chart below to a) find the total inventory of all items in the department for the months of January, February, and March, b) find the total inventory for each item during the three month period, and c) find the total inventory of all items in the department for the entire three month period.

INVENTORY

	Shoes	Purses	Gloves		Total
January	$3780	$ 972	$3646	a.	_____
February	5291	2380	2140	a.	_____
March	2429	1078	1568	a.	_____
Total	b. _____	b. _____	b. _____	c.	_____

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #2--COMPUTE AVERAGE INVENTORY

Given the following monthly inventories, figure the average inventory for the year.

1.

January 1	20,000
February 1	19,000
March 1	19,000
April 1	18,500
May 1	18,000
June 1	19,500
July 1	22,000
August 1	26,000
September 1	26,000
October 1	22,000
November 1	20,000
December 1	19,500
December 31	19,288

2.

August 1	2,000
September 1	8,952
October 1	2,600
November 1	2,700
December 1	2,100
January 1	9,901
February 1	5,200
March 1	2,010
April 1	5,207
May 1	2,500
June 1	7,492
July 1	2,300
July 31	8,190

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #3--COMPUTE STOCK TURNOVER

1. Figure stock turnover in terms of physical units using the following information.

   4000 items were sold
   Average inventory was 1000 of these items

2. Figure stock turnover on a dollar basis if net sales were $150,000 and the average dollar value of stock was $30,000.

3. Figure stock turnover in terms of physical units if 600 units were sold and the average inventory is 50.

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #4--COMPUTE STOCK-SALES RATIO

Figure stock-sales ratio for the following situations.

1. B.O.M. stock $50,000; sales of $20,000

2. E.O.M. stock $50,000; sales $10,000

ASSIGNMENT SHEET #4

3. B.O.M. stock $25,000; sales $5,000

4. E.O.M. stock $20,000; sales $4,000

5. B.O.M. stock $24,000; sales $6,000

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #5--COMPUTE OPEN-TO-BUY

Figure open-to-buy for the following situations using the information provided.

1.	$12,000	Planned sales for the month
	$ 1,500	Stock desired at end of month
	$ 4,000	Merchandise in stock at present time
	$ 1,000	Merchandise already on order

2.	$18,000	Planned sales for month
	$ 6,000	Desired stock at end of month
	$ 2,000	Merchandise in stock at present time
	$ 250	Merchandise already on order

ASSIGNMENT SHEET #5

3.	$20,000	Planned sales for month
	$ 8,000	Desired stock at end of month
	$12,000	Merchandise in stock at present time
	$ 500	Merchandise already on order

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #6--FIGURE DISCOUNTS AND SHIPPING COSTS

1. A store recieves a shipment of merchandise for $300. The invoice is dated April 15 and shows the terms 3/10, n/30.

   a. When must the shipment be paid for in order to be eligible for the discount?

   b. What amount is due if the discount is taken?

   c. What is the date for full payment?

2. Merchandise was shipped August 15 worth $3000 with terms 2/10, n/30, F.O.B. destination.

   a. If the bill was paid on the last day the cash discount could be taken, on what date was the bill paid?

   b. What was the amount of the payment?

3. The manufacturer's suggested list price on an article is $25.00. A trade discount of 35% is offered to the retailer. What is the cost per article for the retailer?

ASSIGNMENT SHEET #6

4. Merchandise was shipped July 15 and was billed at $2500 with terms of 2/10, n/30, F.O.B. destination. The bill was paid on the last day the discount could be taken.

   a. On what date was the bill paid?

   b. What was the amount of the check?

5. The manufacturer's suggested list price on an article is $6.00. A trade discount of 40% is offered to the retailer. What is the cost to the retailer?

6. A store received a shipment of merchandise for $150.00. The invoice is dated March 15 and shows the terms 3/10, n/30, E.O.M.

   a. When must the shipment be paid for in order to be eligible for the discount?

ASSIGNMENT SHEET #6

b. What is the amount due if the discount is taken?

c. What is the last date for full payment?

7. A store receives trade discounts of 20%, 10%, and 5% on a purchase of $3,780. The invoice carries terms of 2/10, n/30 and is dated April 10. If the bill is paid April 18, how much will it be?

(NOTE: Show your work.)

8. An invoice is dated July 2 and has terms 4/10, 60X. What is the final date the cash discount may be taken?

ASSIGNMENT SHEET #6

9. A buyer receives chain discounts of 25%, 10%, 5% on a purchase of 200 dozen Japanese lamps. If the lamps are $23.50 a dozen, how much should the buyer pay for the entire shipment?

(NOTE: Show your work.)

10. The list price of $785.00 is shown for a refrigerator. With trade discounts of 15%, 10%, 5%, how much do you pay?

(NOTE: Show your work.)

ASSIGNMENT SHEET #6

11. A wholesale jewelry company receives discounts of 10%, 5%, and 5%, while a jobber in the same area only receives 10% and 5%.

    a. What is the percentage difference in cost to the middleman?

    b. Which one would pay more for the merchandise?

12. An invoice for men's sweaters was dated November 16 with a billed cost of $100 and terms of 3/10, n/30.

    a. What is the last date the discount may be deducted?

    b. How much should be paid at that time?

13. An invoice for $200 is dated April 14 and carries terms of 5/10 R.O.G. The goods are received on April 16.

    a. What is the last day the discount may be deducted?

    b. How much should be paid at that time?

14. An invoice for merchandise shipped on September 16 is dated October 1 and carries terms of 3/10, n/30.

    a. What is the last date a discount may be taken?

ASSIGNMENT SHEET #6

b. After what date will the invoice become past due?

15. When will payment be due on the following invoices in order to deduct a cash discount? How much should be remitted?

	Date of Invoice	Amount	Terms	Date Due to Receive Discount	Amount Due with Cash Discount
a.	6/7	$300	3/10, 90X		
b.	8/18	$450	3/10, n/30 as of 10/1		
c.	3/17	$725	8/10, E.O.M.		
d.	11/16	$500	5/10, n/30		
e.	12/27	$450	6/10, E.O.M.		

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #7--PRICE MERCHANDISE

1. Figure retail price using the following information.

   a. Cost price $115.00; markup in dollars $15.00

   b. Cost price $2.69; markup in dollars $2.00

   c. Cost price $2.55; markup percentage 15%

   d. Cost price $1.95; markup percentage 15%

ASSIGNMENT SHEET #7

2. Figure cost price using the following information.

   a. Retail price $7.25; markup in dollars $2.00

   b. Retail price $15.95; markup percentage 25%

3. Figure markup in dollars using the following information.

   a. Retail price $14.95; cost price $10.74

   b. Retail price $60.00; cost price $52.00

4. Figure markup as a percentage of retail price using the following information.

   a. Retail price $50; markup in dollars $20.00

ASSIGNMENT SHEET $7

b. Retail price $124.00; markup in dollars $54.00

5. Figure markup as a percentage of cost price using the following information.

   a. Cost price $25.00; markup in dollars $25.00

   b. Cost price $1.00; markup in dollars $1.39

6. Figure initial markup using the following information.

   a. Cost price $.69; original retail selling price $1.00

   b. Cost price $4.00; original retail selling price $6.50

7. Figure maintained markup using the following information.

   a. Cost price $7.95; final sales price $9.00

ASSIGNMENT SHEET #7

b. Cost price $3.25; final sales price $4.00

8. Figure markdown using the following information.

   a. Original retail selling price $9.95; final sales price $6.95

   b. Original retail selling price $10.95; final sales price $6.95

9. Figure markdown percentage using the following information.

   a. Dollar markdown $2.00; total sales $84.00

   b. Dollar markdown $10.00; total sales $400.00

ASSIGNMENT SHEET #7

10. Given the regular markup and the price reduction percentage in the chart below, select the correct percentage of unit increase necessary to maintain the same total markup.

Example: If a unit has a regular markup of 40% and you want to reduce the price 10%, you will have to increase the volume by 33.3% to make that same gross profit

a. If regular markup is 60% and price reduction is 25%, then unit increase will be _____%

b. If regular markup is 50% and price reduction is 25%, then unit increase will be _____%

c. If regular markup is 40% and price reduction is 30%, then unit increase will be _____%

d. If regular markup is 45% and price reduction is 35%, then unit increase will be _____%

e. If regular markup is 35% and price reduction is 15%, then unit increase will be _____%

INCREASE IN SALES VOLUME NEEDED TO OFFSET PRICE REDUCTIONS

Price	Regular Markup of								
Reductions	25%	30%	35%	40%	45%	50%	60%	65%	75%
5%	25%	20%	16.6%	14.3%	12.5%	11.1%	9%	8.3%	7.1%
10%	66.7%	50%	40%	33.3%	28.6%	25%	20%	18.2%	15.3%
15%	150%	100%	75%	60%	50%	42.8%	33.3%	30%	25%
20%	400%	200%	133%	100%	80%	66.6%	50%	44.4%	36.3%
25%		500%	250%	166.6%	125%	100%	70.2%	62.5%	50%
30%			600%	300%	200%	150%	100%	85.7%	66.7%
35%				700%	350%	233%	140%	116.7%	87.5%
40%					800%	400%	200%	160%	114.3%
45%						900%	300%	225%	150%
50%							500%	333%	200%

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #8--COMPLETE PROFIT AND LOSS STATEMENTS

Complete the following profit and loss statements (operating statements).

a.	Net Sales	$400,000
	Cost of Goods Sold	300,000
	Gross Margin	
	Operating Expenses	$ 85,000
	Net Profit Before Income Taxes	
b.	Net Sales	$250,000
	Cost of Goods Sold	195,000
	Gross Margin	
	Operating Expenses	$ 50,000
	Net Profit Before Income Taxes	
c.	Net Sales	$200,000
	Cost of Goods Sold	195,000
	Gross Margin	
	Operating Expenses	$ 7,000
	Net Loss	

MERCHANDISING
UNIT I

ASSIGNMENT SHEET #9--COMPLETE BASIC BUSINESS MATH DIAGNOSTIC TEST

1. a. $\begin{array}{r} 7 \\ \underline{+\ 6} \end{array}$ b. $\begin{array}{r} 8 \\ \underline{+\ 5} \end{array}$ c. $\begin{array}{r} 9 \\ \underline{-\ 5} \end{array}$ d. $\begin{array}{r} 759 \\ \underline{-\ 668} \end{array}$ e. $\begin{array}{r} 1438 \\ \underline{-\ 962} \end{array}$

f. $\begin{array}{r} 579 \\ \underline{\times\ \ 8} \end{array}$ g. $\begin{array}{r} \$6794 \\ \underline{\times\ \ .43} \end{array}$ h. $37\overline{)11433}$

i. $\begin{array}{r} \$.94 \\ \underline{-\ .76} \end{array}$ j. $86\overline{)39345}$ k. $\begin{array}{r} 4 \\ 3 \\ 9 \\ 8 \\ 3 \\ 2 \\ 7 \\ 6 \\ \underline{+\ 5} \end{array}$ l. $\begin{array}{r} \$.48 \\ .96 \\ .23 \\ .37 \\ .15 \\ .89 \\ .64 \\ \underline{+\ .59} \end{array}$ m. $\begin{array}{r} \$7.94 \\ 3.68 \\ 5.49 \\ \underline{+\ 6.27} \end{array}$

n. $\begin{array}{r} 9124 \\ 3758 \\ 6875 \\ \underline{+\ 4392} \end{array}$ o. $\begin{array}{r} 3/8 \\ \underline{+\ 3/4} \end{array}$ p. $\begin{array}{r} 1/6 \\ \underline{+\ 2\ 3/8} \end{array}$ q. $\begin{array}{r} 2/3 \\ \underline{-\ 1/4} \end{array}$

r. $\begin{array}{r} 5 \\ 9 \\ 4 \\ 3 \\ 7 \\ 2 \\ \underline{+\ 1} \end{array}$ s. $\begin{array}{r} 6 \\ 8 \\ 3 \\ 4 \\ 8 \\ 3 \\ \underline{+\ 2} \end{array}$ t. $\begin{array}{r} 10 \\ 12 \\ 7 \\ 8 \\ 12 \\ 7 \\ \underline{+\ 6} \end{array}$ u. $\begin{array}{r} 13 \\ 15 \\ 10 \\ 11 \\ 15 \\ 10 \\ \underline{+\ 9} \end{array}$ v. $\begin{array}{r} 11 \\ 16 \\ 10 \\ 62 \\ 9 \\ \underline{+\ 14} \end{array}$

ASSIGNMENT SHEET #9

w.	x.	y.	z.	aa.
46	99	777	45	$21.45
45	89	101	30	68.32
42	29	222	1	41.25
38	69	345	29	+ 39.40
13	78	118	37	
+ 31	+ 65	+ 479	105	
			444	
			+ 287	

bb.	cc.	dd.
3,300	9,875	7,309
6,714	29	2,618
9,037	4	4,176
8,162	605	7,183
+ 3,817	+ 7,789	+ 2,015

ee. 6 + 4 + 5 + 3 = ___________

ff. 33 + 66 + 44 + 22 = ___________

gg. 52.7 + 6.204 + 35 + 5.90 = ___________

hh. 8,621 + 93 + 156 + 2 = ___________

ii. 65 + 80 + 94 + 72 = ___________

jj. 842 + 96 + 9 + 500 = ___________

kk. 202 + 303 + 461 + 984 = ___________

2. a. How many quarts are there in 3 3/4 gallons? ______qts. qts

b. How many ounces in 1 1/4 pounds? _____ oz

c. How many feet in 1 5/6 yards? _____ ft

d. How many dozen in 144? _____ doz

e. How many inches in 2 1/2 feet? _____ in

f. How many pints in 3 1/2 quarts? _____ pts

g. How many inches in 3/4 yards? _____ in

ASSIGNMENT SHEET #9

3. Look at each row of numbers below and on the two lines following write the two numbers that should come next.

Examples: 2, 4, 6, 8, 10, 12, 14

1, 7, 2, 7, 3, 7, 4, 7

a. 99, 77, 88, 66, 77, 55, _____, _____

b. 1, 5, 4, 8, 7, 11, _____, _____

c. 2, 8, 14, 20, 26, 32, _____, _____

d. 1, 2, 4, 5, 7, 8, _____, _____

e. 20, 32, 44, 56, 68, 80, _____, _____

4. a. If you put $1.50 in your savings account each week for 14 weeks, how much will you save? __________

b. Your store makes a profit of 2 1/2¢ on each bottle of a certain kind of shoe polish. How many bottles must you well to make $12 for the store? __________ bottles

c. How many pencils, selling for 2 for 5¢, will you give a customer for 25¢. __________ pencils

d. If ribbon sells at 1/4 yard for 5¢, how many inches will the customer receive for 30¢. __________ inches

e. If one salesgirl makes a sale every two minutes and another salesgirl makes a sale every 2 1/2 minutes, how many sales will the two girls make in a half hour? __________ sales

f. What change will a customer receive from a 50-cent piece after buying the following articles: 1 notebook cover, 10¢; 1 package of paper, 10¢; 6 scratch pads at 4 for 5¢; 1 eraser, 5¢? __________ ¢

g. If oranges sell at 10 for 25¢, how much will two dozen cost? __________

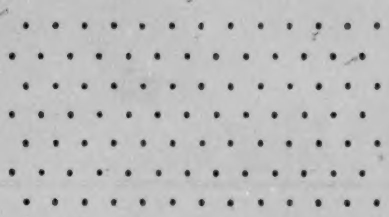
h. A farmer's wife sold 10 dozen eggs at 35¢ a dozen. With the money she received, she bought four and a half yards of dress goods and had 35¢ left. How much were the dress goods per yard? __________ ¢

i. If 2/3 of the 144 screws purchased for the construction of 8 desks are 1 1/4" screws and the rest 3/4" and only 6 desks were actually made, how many 3/4" screws were used? __________ screws

ASSIGNMENT SHEET #9

j. At 12 feet for 5¢, how many yards of crepe paper can be bought for 25¢? __________ yards

k. The dots in the figure below are regularly spaced. How many of them are there? (Don't count every dot.) __________ dots



5. a. A percentage can be expressed as a decimal. Change the following to decimals.

1) 10% = __________
2) 1% = __________
3) 3 1/2% = __________
4) 35% = __________
5) 85 1/2% = __________

b. The word *of* means multiply. Work the following.

1) 10% of 100 = __________
2) 20% of 300 = __________
3) 15% of $4.50 = __________
4) 9% of $6.80 = __________
5) 6% of $8.00 = __________

c. A manufacturer offers to lower some prices by a certain percentage and give a discount. Figure the amount the price will be reduced in each case.

Amount of Discount

1) $10.00 item reduced 10% = __________
2) $20.00 item reduced 20% = __________
3) $15.00 item reduced 8% = __________
4) $45.00 item reduced 12% = __________
5) $60.00 item reduced 40% = __________

ASSIGNMENT SHEET #9

d. Each of the items discounted in problem 3 now have a new discounted price. List the new price below.

Item	Discounted Price
1)	________
2)	________
3)	________
4)	________
5)	________

e. A discount can be expressed as either a percent or a decimal. Change the following to percents.

1) .01 = ________%
2) .10 = ________%
3) .35 = ________%
4) .035 = ________%
5) .010 = ________%

f. The word *of* means multiply. Work the following.

1) 7% of $1.00 = $________
2) 8% of $2.00 = $________
3) 10% of $3.50 = $________
4) 19% of $3.00 = $________
5) 20% of $4.00 = $________

g. A supplier reduces a price if a buyer will pay cash for it. Work out the discount or reduction for each of these situations.

1) $ 20 item reduced 15% = ________
2) $ 40 item reduced 25% = ________
3) $ 60 item reduced 30% = ________
4) $ 90 item reduced 18% = ________
5) $215 item reduced 40% = ________

ASSIGNMENT SHEET #9

6. Budgeting for expenses

A small business owner expects sales to be $15,000.00 for a month. He anticipates his operating expenses to be as follows:

(NOTE: Figure the actual dollar amount that is estimated for each expense.)

BUDGET

Operating Expenses	% of Sales	Dollar Amount
a. Payroll	10%	$ 1,500.00
b. Buying	1%	$ ________
c. Promotional	2 1/2%	$ ________
d. Utilities	2%	$ ________
e. Transportation	1/2%	$ ________
f. Supplies and Delivery	1/2%	$ ________
g. Rent	4%	$ ________

7. Break-even point

a. If the merchandise cost $18.00, the fixed markup is $1.25, and the rest of the markup is 23% of the total of the merchandise cost and fixed markup (residual), what is the break-even retail point?

b. If the merchandise costs $25.00, the fixed markup is $1.80, and the residual markup is 21%, what is the break-even retail point?

MERCHANDISING
UNIT I

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. 732 @ $2.95 = $2159.40
122 @ 6.50 = 793.00
682 @ 2.50 = 1705.00
519 @ 7.50 = 3892.50
300 @ 1.50 = + 450.00
$8999.90 Total inventory at retail

$ 8999.90
x .25
4499950
1799980
2249.9750 Total markup

$8999.90
- 2249.98
$6749.92 Total inventory at cost

2. 230 @ $2.50 = $ 575.00
120 @ 5.00 = 600.00
262 @ 2.50 = 655.00
154 @ 5.75 = 885.50
300 @ 1.00 = + 300.00
$3015.50 Total inventory at cost

3. a. January = $8398 b. Shoes = $11,500
a. February = 9811 b. Purses = 4,430
a. March = 5075 b. Gloves = 7,354

c. $23,284

Assignment Sheet #2

1. $20,676

2. $4704

Assignment Sheet #3

1. $\frac{4000}{1000} = 4$

2. $\frac{\$150,000}{\$\ 30,000} = 5$

3. $\frac{600}{50} = 12$

Assignment Sheet #4

1. $\frac{\$50{,}000}{20{,}000} = \frac{5}{2} = \frac{2.5}{1} = 2.5:1$

2. $\frac{\$50{,}000}{10{,}000} = \frac{5}{1} = 5:1$

3. $\frac{\$25{,}000}{\$\ 5{,}000} = \frac{5}{1} = 5:1$

4. $\frac{\$20{,}000}{\$\ 4{,}000} \doteq \frac{5}{1} = 5:1$

5. $\frac{\$24{,}000}{\$\ 6{,}000} = \frac{4}{1} = 4:1$

Assignment Sheet #5

1. $\begin{array}{r}\$12{,}000\\ +\ \ 1{,}500\\ \hline \$13{,}500\end{array} \qquad \begin{array}{r}\$4{,}000\\ +\ 1{,}000\\ \hline \$5{,}000\end{array} \qquad \begin{array}{r}\$13{,}500\\ -\ \ 5{,}000\\ \hline \$\ \ 8{,}500\end{array}$

2. $\begin{array}{r}\$18{,}000\\ +\ \ 6{,}000\\ \hline \$24{,}000\end{array} \qquad \begin{array}{r}\$2{,}000\\ +\ \ \ \ 250\\ \hline \$2{,}250\end{array} \qquad \begin{array}{r}\$24{,}000\\ -\ \ 2{,}250\\ \hline \$21{,}750\end{array}$

3. $\begin{array}{r}\$20{,}000\\ +\ \ 8{,}000\\ \hline \$28{,}000\end{array} \qquad \begin{array}{r}\$12{,}000\\ +\ \ \ \ 500\\ \hline \$12{,}500\end{array} \qquad \begin{array}{r}\$28{,}000\\ -\ 12{,}500\\ \hline \$15{,}500\end{array}$

Assignment Sheet #6

1. a. April 25 (within 10 days from the date of the invoice, April 15)

   b. $\begin{array}{r}\$300\\ \times\ .03\\ \hline \$9.00\end{array} \qquad \begin{array}{r}\$300\\ -\ \ \ 9\\ \hline \$291\end{array}$

   c. May 15 (within 30 days after the date of the invoice, April 15)

2. a. August 25 (10 days after date of invoice, August 15)

   b. $\begin{array}{r}\$3000\\ \times\ \ .02\\ \hline \$60.00\end{array} \qquad \begin{array}{r}\$3000\\ -\ \ \ 60\\ \hline \$2940\end{array}$

3. $\begin{array}{r}\$25.00\\ \times\ \ \ \ .35\\ \hline 12500\\ 7500\ \\ \hline \$8.7500\end{array} \qquad \begin{array}{r}\$25.00\\ -\ \ 8.75\\ \hline \$16.25\end{array}$

4. a. July 25 (10 days after date of invoice, July 15)

b.

$$\begin{array}{r} \$\ 2500 \\ \times\quad .02 \\ \hline \$50.00 \end{array} \qquad \begin{array}{r} \$2500 \\ -\quad 50 \\ \hline \$2450 \end{array}$$

5.

$$\begin{array}{r} \$\ \ 6.00 \\ \times\quad .40 \\ \hline \$2.4000 \end{array} \qquad \begin{array}{r} \$6.00 \\ -2.40 \\ \hline \$3.60 \end{array}$$

6. a. April 10 (within 10 days after the end of the month of the date of invoice, March 15)

b.

$$\begin{array}{r} \$\ 150 \\ \times\ \ .03 \\ \hline \$4.50 \end{array} \qquad \begin{array}{r} \$150.00 \\ -\quad 4.50 \\ \hline \$145.50 \end{array}$$

c. April 30 (within 30 days after the end of the month of the date of invoice, March 15)

7. $2533.81

$$\begin{array}{r} \$\quad 3780 \\ \times\quad .20 \\ \hline \$756.00 \end{array} \qquad \begin{array}{r} \$3780 \\ -\ 756 \\ \hline \$3024 \end{array} \qquad \begin{array}{r} \$\quad 3024 \\ \times\quad .10 \\ \hline \$302.40 \end{array} \qquad \begin{array}{r} \$3024.00 \\ -\ 302.40 \\ \hline \$2721.60 \end{array}$$

$$\begin{array}{r} \$\ 2721.60 \\ \times\quad .05 \\ \hline \$136.0800 \end{array} \qquad \begin{array}{r} \$2721.60 \\ -\ 136.08 \\ \hline \$2585.52 \end{array} \qquad \begin{array}{r} \$2585.52 \\ \times\quad .02 \\ \hline \$51.7104 \end{array} \qquad \begin{array}{r} \$2585.52 \\ -\quad 51.71 \\ \hline \$2533.81 \end{array}$$

8. September 10 (70 days after date of invoice)

9. $3013.87

$$\begin{array}{r} \$23.50 \\ \times\quad 200 \\ \hline \$4700.00 \end{array} \qquad \begin{array}{r} \$\quad 4700 \\ \times\quad .25 \\ \hline 23500 \\ 9400 \\ \hline \$1175.00 \end{array} \qquad \begin{array}{r} \$4700 \\ -1175 \\ \hline \$3525 \end{array} \qquad \begin{array}{r} \$\quad 3525 \\ \times\quad .10 \\ \hline \$352.50 \end{array}$$

$$\begin{array}{r} \$3525.00 \\ -\ 352.50 \\ \hline \$3172.50 \end{array} \qquad \begin{array}{r} \$\ 3172.50 \\ \times\quad .05 \\ \hline \$158.6250 \end{array} \qquad \begin{array}{r} \$3172.50 \\ -\ 158.63 \\ \hline \$3013.87 \end{array}$$

10. $570.49

$$\begin{array}{r} \$\quad 785 \\ \times\quad .15 \\ \hline 3925 \\ 785 \\ \hline \$117.75 \end{array} \qquad \begin{array}{r} \$785.00 \\ -117.75 \\ \hline \$667.25 \end{array} \qquad \begin{array}{r} \$\ 667.25 \\ \times\quad .10 \\ \hline \$66.7250 \end{array} \qquad \begin{array}{r} \$667.25 \\ -\ 66.73 \\ \hline \$600.52 \end{array}$$

$$\begin{array}{r} \$\ 600.52 \\ \times\quad .05 \\ \hline \$30.0260 \end{array} \qquad \begin{array}{r} \$600.52 \\ -\ 30.03 \\ \hline \$570.49 \end{array}$$

11. a. 5% difference in cost

10% + 5% + 5% = 20% discount for jewelry company
10% + 5% = 15% discount for jobber

$$\begin{array}{r} 20\% \\ -15\% \\ \hline 5\% \end{array}$$

b. Jobber would pay more because the discounts are less than for the jewelry company

12. a. November 26 (10 days from date of invoice, November 15)

b.

$$\begin{array}{r} \$\ 100 \\ \times\ \ .03 \\ \hline \$3.00 \end{array} \qquad \begin{array}{r} \$100.00 \\ -\ 3.00 \\ \hline \$\ 97.00 \end{array}$$

13. a. April 26 (10 days after receipt of goods)

b.

$$\begin{array}{r} \$200 \\ \times\ \ .05 \\ \hline \$10.00 \end{array} \qquad \begin{array}{r} \$200 \\ -\ 10 \\ \hline \$190 \end{array}$$

14. a. October 11

b. October 31

15.

	Date Due to Receive Discount	Amount Due with Cash Discount
a.	9/15	$291.00
b.	10/11	$436.50
c.	4/10	$667.00
d.	11/26	$475.00
e.	1/10	$423.00

Assignment Sheet #7

1. a. $130.00

b. $4.69

c. $3.00

d. $2.29

2. a. $5.25

b. $11.96

3. a. $4.21

b. $8.00

4. a. 40%

b. 44%

5. a. 100%

b. 139%

6. a. $.31

b. $2.50

7. a. $1.05

b. $.75

8. a. $3.00

b. $4.00

9. a. 2.4%

b. 2.5%

10. a. 70.2%

b. 100%

c. 300%

d. 350%

e. 75%

Assignment Sheet #8

a. Gross Margin--$100,000
Net Profit Before Income Taxes--$15,000

b. Gross Margin--$55,000
Net Profit Before Income Taxes--$5,000

c. Gross Margin--$5,000
Net Loss--$2000

Assignment Sheet #9

1. a. 13
b. 13
c. 4
d. 91
e. 476
f. 4,632
g. $2,921.42
h. 309
i. $.18
j. 457.5
k. 47
l. $4.31
m. $23.38
n. 24,149
o. 1 1/8
p. 2 13/24
q. 5/12
r. 31
s. 34
t. 62
u. 83
v. 122
w. 215
x. 429
y. 2,042
z. 978
aa. $170.42
bb. 31,030
cc. 18,302
dd. 23,301
ee. 18
ff. 165
gg. 99.804
hh. 8,872
ii. 311
jj. 1,447
kk. 1,950

2. a. 15 qts
b. 20 oz
c. 5 1/2 ft
d. 12 doz
e. 30 in
f. 7 pts
g. 27 in

3. a. 66, 44
b. 10, 14
c. 38, 44
d. 10, 11
e. 92, 104

4. a. $21
b. 480
c. 10
d. 54
e. 27
f. $.17
g. $.60
h. $.70
i. 36
j. 20
k. 91

5. a. 1) .10
2) .01
3) .035
4) .35
5) .855

b. 1) 10
2) 60
3) $.675
4) $.612
5) $.48

c. 1) $1.00
2) $4.00
3) $1.20
4) $5.40
5) $24.00

d. 1) $9.00
2) $16.00
3) $13.80
4) $39.60
5) $36.00

e. 1) 1%
2) 10%
3) 35%
4) 3.5%
5) 1%

f. 1) $.07
2) $.16
3) $.35
4) $.57
5) $.80

g. 1) $3.00
2) $10.00
3) $18.00
4) $16.20
5) $86.00

6. b. $150.00
c. $375.00
d. $300.00
e. $ 75.00
f. $ 75.00
g. $600.00

7. a. $23.68
b. $32.43

DE II - 71-G

MERCHANDISING
UNIT I

TEST

1. Match terms on the right to the correct definitions on the left by placing the appropriate numbers in the blanks provided.

______a. List of goods shipped, stating quantities, prices, and shipping charges

______b. Pricing merchandise in groups; gives the appearance of a bargain

______c. List of merchandise that is to be kept in stock at all times

______d. Price per item

______e. Counting items before advertising or re-ordering

______f. Amount added to the cost of goods to arrive at the original selling price

______g. Actual count of the goods in stock, usually taken two to four times a year

______h. Reduction of selling price to a lower price

______i. Way cost of merchandise is placed on the sales ticket for inventory and other planning and control functions

______j. Shopping in other stores to study the types, quality, and prices of merchandise being offered by competitors in comparison with one's own store

______k. Form on which salespeople may write down merchandise asked for but which is not in stock at the present time

______l. Products made with the trademark of manufacturers or producers

1. Invoice
2. Basic stock list
3. Stock count
4. Physical inventory
5. Cost code
6. Comparison shopping
7. National brands
8. Private brands
9. Trademark (brand)
10. Budget
11. Memo
12. Gross
13. Net
14. Fashion goods
15. Staple goods
16. Want slip (want list)

_____m. Merchandise that is always kept in stock

_____n. Products made with the trademark of retailers or wholesalers

_____o. New goods with a relatively short life span but which are of temporary interest to many people

_____p. Word, mark, and/or symbol used to identify a product or service

_____q. What is left after all expenses and losses are deducted

_____r. Estimate of income and expenses for various operations

_____s. Overall total before deductions are subtracted

_____t. Informal written reminder

_____u. Time limits on payment of purchases

_____v. Expenses that are different for each item but are approximately the same percentage of the selling price

_____w. Merchandise which must be paid for at time of delivery

_____x. Expenses that are about the same for every article regardless of its cost or selling price

_____y. Retail price paid by consumer; sometimes suggested by the manufacturer

_____z. Volume of sales where the revenue received covers costs and all future sales represent profit

____aa. Record kept of each item showing the amount of merchandise put in stock, withdrawn, and on hand at any particular time without the necessity of taking a physical count

____bb. Income from an investment

17. Markdown
18. Markup (mark-on, initial markup)
19. Unit pricing
20. Multiple pricing
21. Variable costs
22. Fixed costs (flat expenses)
23. Break-even point
24. Revenue
25. Ratio
26. Net profit
27. Operating expenses (overhead)
28. Gross margin (maintained margin)
29. Cost of goods sold
30. Net sales
31. Gross sales
32. Open-to-buy
33. Perpetual inventory system
34. List price
35. C.O.D. (cash on delivery)
36. Dating
37. Purchase order
38. Stock-sales ratio
39. Turnover

______cc. Amount of money left during a given period to purchase merchandise without going over the planned inventory

______dd. Relationship in amount or size between two or more things

______ee. Total amount of goods or services sold

______ff. Amount of money left after payment of all costs and expenses other than income taxes

______gg. Gross sales less any returns or adjustments

______hh. Costs of running a business, not directly related to the merchandise sold

______ii. Amount paid for merchandise, including all shipping costs

______jj. Difference between net sales and cost of goods sold

______kk. Number of times during a given period that the average amount of stock on hand is sold and replaced

______ll. Form used to order merchandise from the manufacturer or wholesaler

______mm. Relationship of retail stock to the sales for that month

2. Distinguish between operations/merchandising duties and sales promotion duties in a business. Place an "X" in front of those duties which are operations/merchandising duties and an "O" in front of those duties which are sales promotion duties.

______a. Advertising

______b. Special promotional activities

______c. Providing customer services, returns, and adjustments

______d. Buying

______e. Display

______f. Personal selling

______g. Stockkeeping

______h. Receiving and checking merchandise

______i. Pricing

______j. Marking merchandise

3. List three factors to consider before buying merchandise for resale.

a.

b.

c.

4. Select from the following list items used to analyze a business's performance. Place an "X" in the correct blanks.

______a. Sales records

______b. Customers

______c. Comparison shopping

______d. Surveys of customers

______e. Talks with sales representatives

______f. Trade journals and papers

______g. Inventory records

5. Compute inventory using retail prices and cost codes.

a. Given the following number of items and their retail prices, compute the total inventory. Markup is 25% of retail.

732 items @ $2.95
122 items @ $6.50
682 items @ $2.50
519 items @ $7.50
300 items @ $1.50

b. Given the following number of items and their costs, compute the total inventory.

230 items @ $2.50
120 items @ $5.00
262 items @ $2.50
154 items @ $5.75
300 items @ $1.00

6. Arrange in order the steps in taking a physical inventory. Place a "1" by the first step, a "2" by the second step, and so on.

______a. Have caller look occasionally to see if checker is recording information accurately

______b. Divide the store according to its layout or established departments

______c. Have checker record information on an inventory form

______d. Have caller give out information to the checker

______e. Form a team consisting of a checker and a caller

______f. Group merchandise according to price, type, and style

7. Define the types of perpetual inventory systems listed below.

a. FIFO--

b. LIFO--

8. Compute average inventory in the following situation.

A store had the following beginning inventories: January $20,000; February $19,000; March $19,000; April $18,500; May $18,000; June $19,500; July $22,000; August $26,000; September $26,000; October $22,000; November $20,000; December $19,500. The ending inventory on December 31 was $19,288.

9. Compute stock turnover for the following situations.

a. In terms of physical units

600 watches were sold and the average inventory was 50 watches

b. On a dollar basis

Net sales were $150,000 and the average inventory in stock was $30,000

10. Compute stock-sales ratio for the following situations.

a. Amount of stock at retail at the beginning of the month was $25,000 and the sales were $5,000

b. Amount of stock at retail at the end of the month was $20,000 and the sales were $4,000

11. Compute open-to-buy for the following situation.

Planned sales for the month are $20,000 and the amount of stock desired at the end of the month is $8,000. There is currently an inventory of $12,000. There is $500 worth of merchandise being shipped.

12. Match the following discount and shipping terms on the right to correct descriptions on the left by placing the appropriate numbers in the blanks provided.

______a. Allowance for advertising the merchandise

______b. Special discount offered those who place orders well in advance of the normal buying period

______c. Special deduction from the list price stated in catalogs

______d. Deduction given if full payment is made early

______e. Payment of merchandise computed from a date after the merchandise is shipped

______f. Additional days, designated by an "X," given to the buyer before payment is due

______g. Discount period not beginning until the day the merchandise is received by the store rather than beginning on the invoice date

______h. Amount must be paid by the end of the month

______i. Two or more discounts deducted from the list price

______j. Merchandise remains the property of the seller and is paid for after it has been sold; any unsold merchandise may be returned to original seller if it is in good condition

______k. Point in the transfer of merchandise where the person buying the merchandise begins paying the shipping costs

1. Cash discount
2. Trade discount
3. Seasonal discount
4. Promotional discount
5. Chain (series) discount
6. E.O.M. (End of Month)
7. R.O.G. (Receipt of Goods)
8. Extra dating
9. Advance dating (postdating)
10. F.O.B. (Free on Board)
11. Consignment

13. List factors affecting price.

a.

b.

c.

14. Apply the formulas used in pricing merchandise to the problems listed on the following pages.

FORMULAS USED IN PRICING MERCHANDISE

Given	To Find	Procedure
Cost price, retail price	Markup in dollars	Subtract cost from retail
Markup in dollars, retail price	Cost price	Subtract markup from retail
Markup in dollars, cost price	Retail price	Add cost and markup
Retail price, markup in dollars	Markup percentage (retail)	Divide markup by retail
Cost price, markup in dollars	Markup percentage (cost)	Divide markup by cost
Cost price, original retail selling price	Initial markup	Subtract cost price from orginal retail selling price
Cost price, final sales price	Maintained markup	Subtract cost price from final sales price
Retail price, markup percentage	Cost price	Multiply retail price by (100% - M%)
Cost price, markup percentage	Retail price	Divide cost by (100% - M%)
Estimated expenses, profits, price reductions, sales	Initial markup	Add expenses, profits, and price reductions; divide this figure by (Sales + Reductions)
Original retail selling price, final sales price	Markdown	Subtract final sales price from original retail price
Dollar markdown, total sales	Markdown percentage	Divide dollar markdown by total sales

a. Find the markdown if the original retail selling price is $10.95 and the final sales price is $6.95.

b. Figure the retail price if the cost price is $2.55 and the markup percentage is 15%

c. Find the retail price if the cost price is $115 and the markup is $15.

d. Find the initial markup if the cost price is $4.00 and the original retail selling price is $6.50.

e. Find the markup in dollars if the cost price is $52.00 and the retail price is $60.00.

f. Find the maintained markup if the cost price is $3.25 and the final sales price is $4.00.

g Figure the markup percentage of cost if the cost price is $25.00 and the markup is $25.00.

h. Find the markup percentage of retail if the retail price is $50 and the markup in dollars is $20.

i. Find the cost price if the markup in dollars is $2.00 and the retail price is $7.25.

j. Find the cost price if the markup percentage is 25% and the retail price is $15.95.

15. List five categories of operating expenses for a business.

a.

b.

c.

d.

e.

16. Complete a profit and loss statement using the following information: net sales $600,000; cost of goods sold $300,000; and operating expenses $95,000.

17. Complete a diagnostic test of basic business math to discover areas which need further study.

(NOTE: If the above activity has not been accomplished prior to the test, ask your DE teacher-coordinator when it should be completed.)

MERCHANDISING
UNIT I

ANSWERS TO TEST

1\.
a. 1
b. 20
c. 2
d. 19
e. 3
f. 18
g. 4
h. 17
i. 5
j. 6
k. 16
l. 7
m. 15
n. 8
o. 14
p. 9
q. 13
r. 10
s. 12
t. 11
u. 36
v. 21
w. 35
x. 22
y. 34
z. 23
aa. 33
bb. 24
cc. 32
dd. 25
ee. 31
ff. 26
gg. 30
hh. 27
ii. 29
jj. 28
kk. 39
ll. 37
mm. 38

2\.
a. O
b. O
c. X
d. X
e. O
f. O
g. X
h. X
i. X
j. X

3. Any three of the following:

a. Figures from previous year

1) Sales records
2) Stock records
3) Purchase orders
4) Markups
5) Markdowns

b. What merchandise was selling well in a particular recent month

c. Business conditions

d. Styles that may change rapidly

e. Whether the department or business is growing or holding its own

f. Shipping conditions

   1) Length of time before merchandise can be received

   2) Number of regularly scheduled deliveries

   3) Condition in which merchandise will arrive

   4) Cost of shipping

g. Competition's activities

h. Turnover rate

i. Seasonal fluctuations

j. Special events to be observed

4. a, b, c, d, e, f, g

5. a.

732 @ $2.95	=	$2159.40		
122 @ 6.50	=	793.00		
682 @ 2.50	=	1705.00		
519 @ 7.50	=	3892.50		
300 @ 1.50	=	+ 450.00		
		$8999.90	Total inventory at retail	

$ 8999.90
x .25
4499950
1799980
$2249.9750 Total markup

$8999.90
- 2249.98
$6749.92 Total inventory at cost

b.

230 @ $2.50	=	$ 575.00	
120 @ 5.00	=	600.00	
262 @ 2.50	=	655.00	
154 @ 5.75	=	885.50	
300 @ 1.00	=	+ 300.00	
		$3015.50	Total inventory at cost

6.

a.	6	d.	4
b.	2	e.	1
c.	5	f.	3

7. a. FIFO--First items placed in stock are the first ones taken out

b. LIFO--Newest items placed in stock are the first ones taken out

8.

January 1	$ 20,000
February 1	19,000
March 1	19,000
April 1	18,500
May 1	18,000
June 1	19,500
July 1	22,000
August 1	26,000
September 1	26,000
October 1	22,000
November 1	20,000
December 1	19,500
December 31	19,288
	$268,788

$$\begin{array}{r} \$20676 \\ 13\overline{)\$268,788} \\ \underline{26} \\ 87 \\ \underline{78} \\ 98 \\ \underline{91} \\ 78 \\ \underline{78} \\ 0 \end{array}$$

9. a. $\frac{600}{50} = 12$

b. $\frac{\$150,000}{\$\ 30,000} = 5$

10. a. $\frac{\$25,000}{\$\ 5,000} = 5:1$

b. $\frac{\$20,000}{\$\ 4,000} = 5:1$

11.

$$\begin{array}{r} \$20,000 \\ +\ \ 8,000 \\ \hline \$28,000 \end{array} \qquad \begin{array}{r} \$12,000 \\ +\ \ \ 500 \\ \hline \$12,500 \end{array} \qquad \begin{array}{r} \$28,000 \\ -\ 12,500 \\ \hline \$15,500 \end{array}$$

12. a. 4

b. 3

c. 2

d. 1

e. 9

f. 8

g. 7

h. 6

i. 5

j. 11

k. 10

13. a. Cost of merchandise

b. Overhead expenses

c. Desired profit

14. a.

$10.95
- 6.95
$ 4.00

b.

$3.00
.85‸ ⟌ 2.55‸00
255

c.

$115
+ 15
$130

d.

$6.50
- 4.00
$2.50

e.

$60.00
- 52.00
$ 8.00

f.

$4.00
- 3.25
$ .75

g.

1.00 = 100%
$25.00‸ ⟌ $25.00‸00
2500

h.

.40 = 40%
$50.00‸ ⟌ $20.00‸00
20000

i.

$7.25
- 2.00
$5.25

j.

$ 15.95
x .75
7975
11165
$11.9625 = $11.96

15. Any five of the following:

a. Salaries and wages of all management, sales, and office employees

b. All types of advertising expenses

c. Depreciation on buildings, furniture, fixtures, and delivery equipment

d. Rent

e. Store supplies

f. Delivery expenses

g. Communication expenses

h. Taxes on merchandise and personal property used in the business

i. Repairs on buildings, fixtures, and equipment

j. Insurance

k. Traveling expenses to market, trade shows, and trade association conventions

l. Bad debt losses

m. Donations

n. Membership dues in trade associations, chamber of commerce, professional and civic organizations

o. Miscellaneous

16.

Net Sales	$600,000
Cost of Goods Sold	- 300,000
Gross Margin	$300,000
Operating Expenses	- 95,000
Net Profit Before Income Taxes	$205,000

17. Evaluated to the satisfaction of the teacher-coordinator

STORE ORGANIZATION
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be acquainted with the various types of store ownership, internal store structure, and classifications of merchandise. This will be accomplished by selecting from lists true statements about types of business organizations and line and staff organizational charts and by matching classifications of merchandise to descriptions of each. This knowledge will be evidenced by a score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with store organization to the correct definitions.
2. Select from a list true statements about types of business organizations.
3. Select from a list true statements about line and staff organizational charts.
4. Match classifications of merchandise to descriptions of each.

STORE ORGANIZATION
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

- A. Give pretest using objective sheet.
- B. Invite lawyer to speak on partnership agreements, incorporation, and other related topics.
- C. Invite an insurance agent to speak on types of insurance for various business organizations.
- D. Provide student with objective sheet.
- E. Provide student with information and assignment sheets.
- F. Assign students to report on the kinds of businesses discussed in this unit that are found in their community.
- G. Make transparencies.
- H. Discuss unit and specific objectives.
- I. Discuss information and assignment sheets.
- J. Give test.
- K. Reteach if necessary.
- L. Test again until minimum standard is reached.

II. Student:

- A. Read objective sheet.
- B. Study information sheet.
- C. Take notes.
- D. Complete assignment sheet.
- E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Transparency masters

      1. TM 1--Line Organization

      2. TM 2--Line and Staff Organization

   D. Assignment Sheet #1--Organizational Chart

   E. Test

   F. Answers to test

II. References:

   A. Richert, G. H.; Meyer, Warren G.; Haines, Peter G.; and Harris, E. Edward. *Retailing Principles and Practices.* 6th ed. Dallas, Texas: Gregg and Community College Division/McGraw-Hill Book Co., 1974.

   B. Mason, Ralph E.; Rath, Patricia Mink; and Ross, Herbert L. *Marketing and Distribution.* 2nd ed. Dallas, Texas: Gregg and Community College Division/McGraw-Hill Book Co., 1974.

STORE ORGANIZATION
UNIT I

INFORMATION SHEET

I. Terms and definitions

A. Retailer--Business which sells goods in relatively small quantities directly to consumers

B. Wholesaler--Business which sells products in large quantities to retailers, government, industries, or institutions for resale or business use

C. Rack-jobber--Kind of wholesaler, most commonly found in grocery stores, who sells nonfood items to retailers and who assumes the retailing duties of marking prices, selecting merchandise to display, and replacing old merchandise with fresh items

D. Organizational chart--Picture of the division of responsibility in a business organization

E. Line control--Authority in a business traced in a direct path from the top management down to the lowest administrative unit in the organization (Transparency 1)

F. Staff control--Specialists added to a business organization for the purpose of giving advice and assistance (Transparency 2)

G. Utility--Usefulness added to products by changing their form or by getting them to the customers at the most convenient time and place

Example: Late store hours, shopping center locations

II. Types of business organizations

(NOTE: There may be some overlapping of these classifications. For example, a chain store may also be a corporation. Also, this list of business organizations is not meant to be all inclusive.)

A. Individual proprietorship

1. Is owned and managed by one person

2. Gives freedom of action

3. Stimulates pride in ownership

INFORMATION SHEET

4. May join with other stores or organizations to gain buying power

   Example: I.G.A. (Independent Grocers' Association)

5. Requires owner to bear all expenses

   Example: Interest cost on loan to start business

B. Partnership

1. Is owned and managed by two or more people
2. Gives additional finances and management ability to the business
3. Requires profits to be divided among partners

   (NOTE: The responsibilities, duties, and share of profits should be stated clearly in writing before the partnership begins.)

4. Makes each partner responsible for business contracts made by the other partners
5. May dissolve when partners disagree or when one partner dies

C. Corporation

1. Is owned by stockholders

   (NOTE: There may be several thousand stockholders.)

2. Is financed by the sale of stock
3. Is managed by a board of directors
4. Requires that profits be divided among stockholders
5. Requires a charter from the state, which allows the company to conduct business transactions as a single person
6. Has heavy taxes and government restrictions
7. Has tremendous possibilities for growth, expert management, and continued existence

INFORMATION SHEET

D. Cooperative

Examples: Rural Electric Cooperative, farmers' cooperatives

1. Is owned and operated by members of the organization for the benefit of the organization's members
2. Is financed by the sale of stock
3. Is managed by a board of directors
4. Requires that profits be divided among stockholders
5. Allows its members to buy goods in quantity so the goods can be bought at a lower price

E. Chain store

Example: Safeway, Montgomery Wards

1. Consists of four or more stores of a similar type
2. Is centrally owned
3. Has centrally controlled operations

   Example: Centralized purchasing and personnel administration

4. May receive special discounts for buying in large quantities or directly from the manufacturer
5. May have difficulty in buying for local situations
6. Will probably specialize in fast-selling merchandise

F. Branch store

(NOTE: Branch stores resemble chain stores in many ways but are usually more self-governing than chain stores.)

Example: Store in a shopping center which is an extension of a downtown store

1. Consists of stores of similar type
2. Is responsible for its own stock

   (NOTE: A branch store, thus, may have a wider variety of merchandise than a chain store.)

INFORMATION SHEET

3. May centralize a few operations

   Example: Collective advertising effort

G. Franchise

Examples: McDonald's, Baskin-Robbins Ice Cream Store, Holiday Inn, Avis Rent-A-Car, Pepsi-Cola wholesaler, auto agencies

1. May be independently owned
2. Is granted exclusive right by the manufacturer to sell goods or services in a particular market area
3. Has rules for the operation established by the manufacturer in exchange for use of the company's name
4. Receives help in financing, record keeping, sales promotion, and management

H. Leased dealership

Examples: Many major service stations

Beauty shops, optical products, and soda fountains found in department stores but leased to persons with special knowledge in those areas

1. Is owned and maintained by a company

   Example: Company owns land, building, and equipment

2. Is leased to someone to operate

   Example: Lessee would own the merchandise

3. Receives benefits of the company's national advertising
4. Requires less initial investment to get started than an independent retailer

I. Sideline store--Is owned and operated by groups or individuals with other major interests

Examples: Store operated by an industrial plant for the benefit of employees located in isolated areas

Army post exchange

Store operated by a utility company to sell appliances using electricity or gas

INFORMATION SHEET

J. Conglomerate--Owns a wide variety of unrelated businesses

Example: J. C. Penney Company operates department stores and a drug store chain

K. Merchant wholesaler

(NOTE: This type of business organization is also known as a regular wholesaler or service wholesaler.)

Example: Rack-jobber

1. May carry a variety of lines or deal in a specialty line of goods
2. May provide all or a limited number of wholesaling services

   Examples: Sell for the manufacturer, store the products, allocate the products in smaller quantities than the manufacturer can, transport the products, extend credit to the retailer, assist in sales promotion, provide marketing information from research or the wholesaler's numerous contacts

L. Agent

Examples: Agricultural products or livestock agent, medical drug agent, stock broker, real estate broker, seller of iron ore

1. Assists manufacturers in buying and selling
2. Is paid by a commission

   (NOTE: This is a percent of the total sale.)
3. May not take title to the goods
4. May not physically handle the goods

III. Line and staff organizational chart (Transparencies 1 and 2, Assignment Sheet #1)

(NOTE: A business may be entirely a line organization or a combination line and staff organization.)

A. Shows line of authority and responsibility

B. Shows advisory function of staff members

INFORMATION SHEET

C. Indicates line of promotion

D. Prevents duplication of efforts

IV. Classifications of merchandise

(NOTE: The kind of product determines the amount of technical knowledge needed.)

A. Industrial goods--Products usually used in the operation of a business

Examples: Computers, secretarial supplies and equipment

B. Consumer goods--Products used by the ultimate consumer

1. Soft line--Consumer goods which are not generally expected to last a long time

Examples: Most clothing, shoes, linens, and other textiles

2. Hard line--Consumer goods which are generally expected to last a long time

Examples: Appliances, furniture, hardware

3. Food line--Edible, perishable consumer goods

Examples: Meat, milk, pastry

C. Convenience goods--Products purchased usually on an impulse and which can be found in many different locations without going from store to store for the best buy

Examples: Cigarettes, chewing gum, razor blades, flash cubes, light bulbs

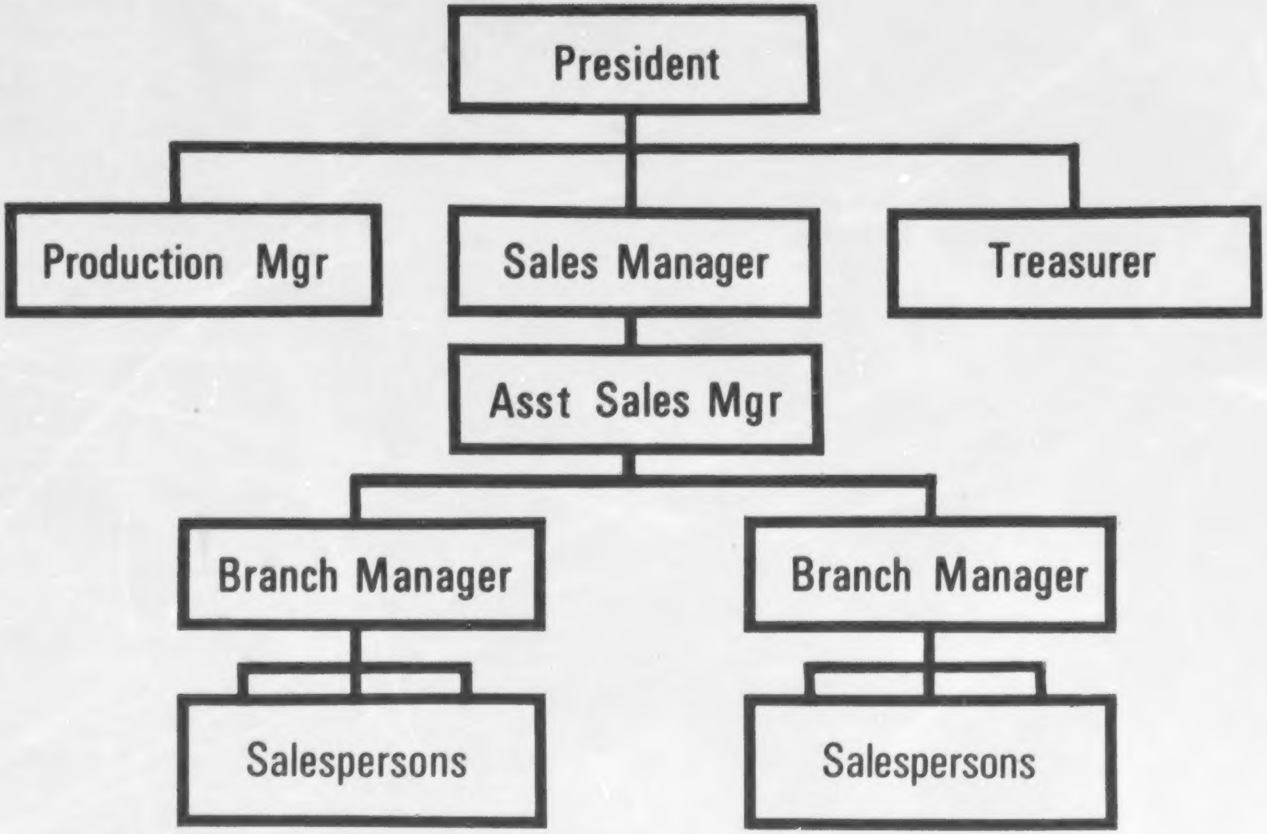
D. Shopping goods--Products purchased usually only after comparing quality and price in several stores

Examples: Clothing and furniture

E. Specialty goods--Particular brand of product that the consumer will make a special effort to obtain

Examples: Expensive clothes, automobiles

Line Organization



President

Production Mgr

Sales Manager

Treasurer

Asst Sales Mgr

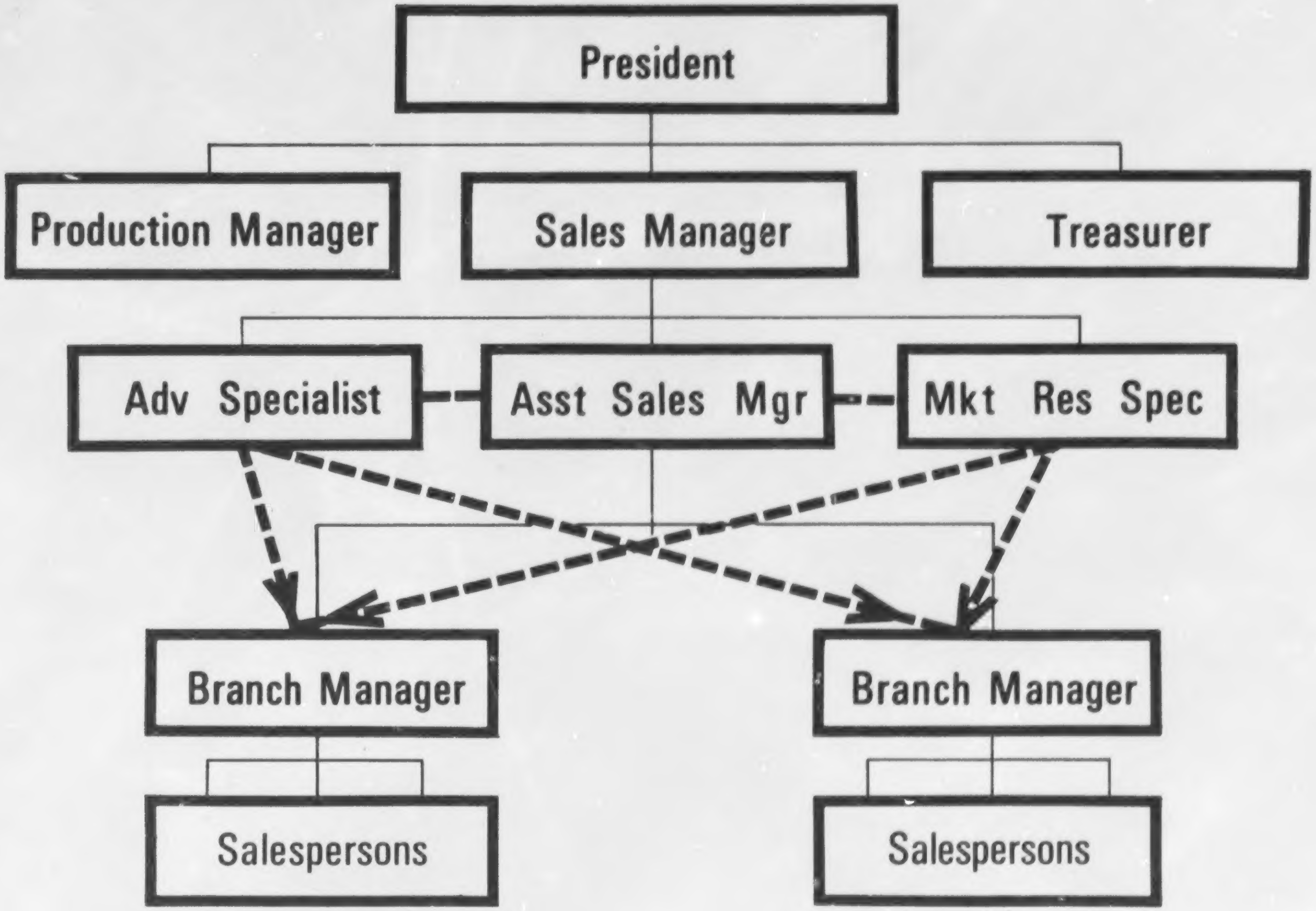
Branch Manager

Branch Manager

Salespersons

Salespersons

Line and Staff Organization



President

Production Manager

Sales Manager

Treasurer

Adv Specialist

Asst Sales Mgr

Mkt Res Spec

Branch Manager

Branch Manager

Salespersons

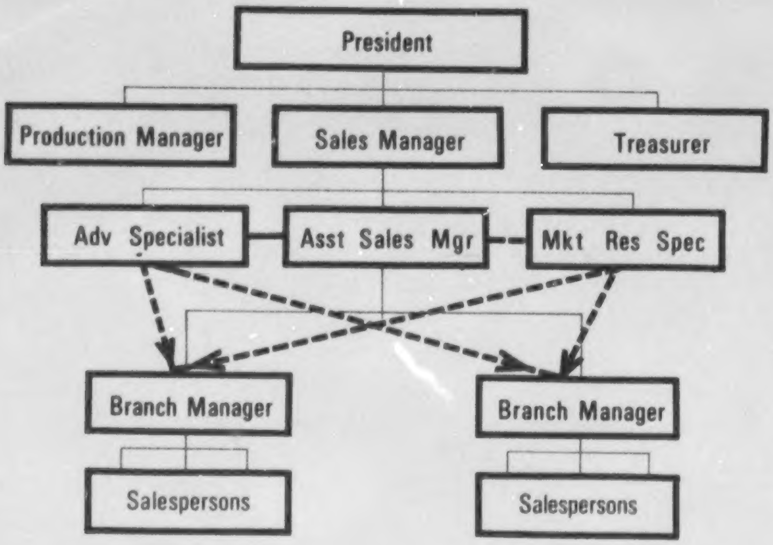
Salespersons

STORE ORGANIZATION
UNIT I

ASSIGNMENT SHEET #1--ORGANIZATIONAL CHART

1. Answer the following questions about the organizational chart below.

Line and Staff Organization


President
Production Manager
Sales Manager
Treasurer
Adv Specialist
Asst Sales Mgr
Mkt Res Spec
Branch Manager
Branch Manager
Salespersons
Salespersons

a. Who is responsible for production?

b. Who has direct authority over the branch managers?

c. Who do the advertising specialist and market research specialist advise and assist?

d. What is the most logical series of steps for a salesperson to go through to become a sales manager?

ASSIGNMENT SHEET #1

2. Draw the organizational chart for your DE training station.

STORE ORGANIZATION
UNIT I

ANSWERS TO ASSIGNMENT SHEET

1. a. Production manager

   b. Assistant sales manager

   c. Branch managers

   d. From salesperson to branch manager, to assistant sales manager, to sales manager

2. Answered to satisfaction of the DE teacher-coordinator

STORE ORGANIZATION
UNIT I

TEST

1. Match the terms on the right to the correct definitions on the left by placing the appropriate numbers in the blanks provided.

______a. Picture of the division of responsibility in a business organization

______b. Kind of wholesaler, most commonly found in grocery stores, who sells nonfood items to retailers and who assumes the retailing duties of marking prices, selecting merchandise to display, and replacing old merchandise with fresh items

______c. Authority in a business traced in a direct path from the top management down to the lowest administrative unit in the organization

______d. Business which sells products in large quantities to retailers, government, industries, or institutions for resale or business use

______e. Specialists added to a business organization for the purpose of giving advice and assistance

______f. Business which sells goods in relatively small quantities directly to consumers

______g. Usefulness added to products by changing their form or by getting them to the customers at the most convenient time and place

1. Utility
2. Staff control
3. Line control
4. Organizational chart
5. Rack-jobber
6. Wholesaler
7. Retailer

2. Select from the list below true statements about types of business organizations. Place an "X" in the correct blanks.

______a. Partnership is owned and managed by one person

______b. Individual proprietorship gives freedom of action and stimulates pride in ownership _____c. Individual proprietorship may join with other stores or organizations to gain buying power

_____d. Partnerships are formed to give additional finances and management ability to the business

_____e. Partnership may dissolve when partners disagree or when one partner dies

_____f. In a partnership each partner is responsible for business contracts made by the other partners

_____g. Corporation is owned by stockholders

_____h. Profits in a corporation are divided among the board of directors

_____i. Corporation requires a charter from the state, which allows the company to conduct business transactions as a single person

_____j. Cooperative allows its members to buy goods in quantity so the goods can be bought at a lower price

_____k. Chain store consists of four or more stores of a similar type

_____l. Branch store is centrally owned and operated

_____m. Chain store is responsible for its own stock

_____n. Franchise may be independently owned

_____o. Franchise is granted exclusive right by the manufacturer to sell goods or services in a particular market area

_____p. Franchise has rules for the operation established by the manufacturer in exchange for use of the company's name

_____q. Franchise receives help in financing, record keeping, sales promotion, and management

_____r. In a leased dealership the business is owned and maintained by a company but is leased to someone to operate

_____s. Leased dealership receives benefits of the company's national advertising

_____t. Leased dealership requires a larger initial investment to get started than an independent retailer

_____u. Merchant wholesaler may carry a variety of lines or deal in a specialty line of goods

_____v. Merchant wholesaler may provide all or a limited number of wholesaling services ______w. Agent assists manufacturers in buying and selling

______x. Agent is paid by a commission

______y. Agent may not take title to the goods or even physically handle the goods

______z. Conglomerate and sideline store are two different names for the same type of store organization

3. Select from the list below true statements about line and staff organizational charts. Place an "X" in the correct blanks.

______a. Show that staff members have the most authority

______b. Show the advisory function of line members

______c. Indicate the line of promotion

______d. Prevent duplication of efforts

4. Match the classifications of merchandise on the right to correct descriptions on the left. Place the appropriate numbers in the blanks provided.

______a. Particular brand of product that the customer will make a special effort to obtain

______b. Products purchased usually only after comparing quality and price in several stores

______c. Products purchased usually on an impulse and which can be found in many different locations without going from store to store for the best buy

______d. Products usually used in the operation of a business

______e. Products used by the ultimate consumer

______f. Consumer goods which are not generally expected to last a long time

______g. Consumer goods which are generally expected to last a long time

______h. Edible, perishable consumer goods

1. Industrial goods
2. Consumer goods
3. Soft line
4. Hard line
5. Food line
6. Convenience goods
7. Shopping goods
8. Specialty goods

STORE ORGANIZATION
UNIT I

ANSWERS TO TEST

1. a. 4
   b. 5
   c. 3
   d. 6
   e. 2
   f. 7
   g. 1

2. b, c, d, e, f, g, i, j, k, n, o, p, q, r, s, u, v, w, x, y

3. c, d

4. a. 8
   b. 7
   c. 6
   d. 1
   e. 2
   f. 3
   g. 4
   h. 5

ECONOMICS OF FREE ENTERPRISE
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to list necessary production resources, government's roles in the economy, things that determine elasticity of demand, and the benefits of competition and profit. He/she should be able to select from a list the ways prices influence the economy and to match the economic goals of Americans to statements concerning each. He/she should also be able to discuss the roles of individuals and businesses in the economy, discuss the function of supply and demand, and apply economic principles to business situations. This knowledge will be evidenced by scoring eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with economics of free enterprise to the correct definitions.
2. List the resources necessary for production of goods and services.
3. Match the economic goals of American people to statements describing each goal.
4. List the roles of government in the economy.
5. Discuss the roles of individuals and businesses in the economy.
6. Discuss the function of supply and demand schedules.
7. List the things that determine the degree of elasticity of demand.
8. Select from a list the ways prices influence the economy.
9. List the benefits of competition and profit.
10. Apply economic principles to business situations.

ECONOMICS OF FREE ENTERPRISE
UNIT I

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:

   A. Provide student with objective sheet.

   B. Give pretest using objective sheet.

   C. Order films.

   D. Provide student with information sheet.

   E. Make transparencies.

   F. Discuss unit and terminal objectives.

   G. Discuss information and assignment sheets.

   H. Participate in Free Enterprise Project sponsored by the Phillips Petroleum Company.

   I. Give test.

   J. Reteach if necessary.

   K. Test again until minimum standard is reached.

II. Student:

   A. Read objective sheet.

   B. Study information sheet.

   C. Take notes.

   D. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Transparency masters

      1. TM 1--Alternate Uses for Scarce Land

      2. TM 2--Alternate Uses for Scarce Capital

3. TM 3--Alternate Uses for Scarce Manpower
4. TM 4--Interdependence
5. TM 5--Desire for Stability vs Desire for Freedom
6. TM 6--Desire for Security vs Desire for Efficiency
7. TM 7--Desire for Growth vs Desire for Justice
8. TM 8--Circular Flow Between Government and the Public
9. TM 9--Circular Flow Between Producers and the Public
10. TM 10--Supply and Demand Schedule
11. TM 11--Supply and Demand Curves
12. TM 12--Ways Prices Influence the Economy
13. TM 13--USA vs USSR Comparative Standard of Living
14. TM 14--USA vs USSR Comparative Standard of Living (Continued)

D. Assignment Sheet #1--Application of Economic Principles

E. Test

F. Answers to test

II. Reference--Calderwood, James D. and Fersh, George L. *Economics for Decision Making.* New York: Macmilian Publishing Co, Inc., 1974.

III. Films:

A. "Free Enterprise--What's That?"

B. "Profits."

(NOTE: The above films are available from Mr. D. E. Braden, Director of Marketing and Training; Phillips 66; 334 Adams Building; Bartlesville, Oklahoma 74004.)

C. "The Kingdom of Moncha." Available from Mr. Jim Patterson, Manager; Public Affairs; Standard Oil Company (Indiana); 200 East Randolph Drive, MC 3707; Chicago, Illinois 60601.

ECONOMICS OF FREE ENTERPRISE
UNIT I

INFORMATION SHEET

I. Terms and definitions

A. Economics--Study of how persons can best consume, produce, and distribute goods and services to try to satisfy their never-ending and ever-increasing wants

B. Allocation--Choosing among the variety of ways of consuming or using scarce resources to produce the goods and services wanted (Transparencies 1, 2, and 3)

C. Economic system--Organized system whereby a country allocates resources among alternative uses

D. Opportunity cost--True value of what individuals and societies must give up when they decide to use a resource to produce one good or service instead of another

E. Micro-economics--Looking at an individual part of the economy, such as an individual consumer, individual business, or a market for a particular product

F. Macro-economics--Looking at the whole economy, such as the rate of growth for the country, inflation, total employment, and total production

G. Specialization--Individuals or countries doing the jobs they are best fitted to perform instead of dividing their resources among many different jobs

Example: Detroit is the center of the auto industry; Miami Beach is a vacation resort; Brazil is known for coffee

H. Interdependence--Depending on others to provide most goods and services as a result of specialization (Transparency 4)

I. Free enterprise--System where most production is done by privately owned corporations, partnerships, and private citizens in a free market; sometimes called private enterprise

J. Demand--Amount of a good or service a customer will want to buy at different prices at a particular time

K. Supply--Amount of goods or services that will be offered for sale at different prices

INFORMATION SHEET

L. Elasticity--How much the demand for a good or service will increase if the price is lowered or how much the demand will decrease if the price is raised

Example: If the price of cars were cut by 50 percent, the demand would probably increase greatly

M. Inelasticity--Condition where demand is not affected much by a change in price

Example: If the price of salt were cut by 50 percent, the demand would not increase very much

N. Product market--Where goods and services are sold by producers to consumers who in turn pay money to the producers for these goods and services (Transparency 9)

O. Factor market--Where the factors of production (labor, management, property, and savings) flow from the public to the producers and where money payments (wages, salaries, interest, rent, and dividends) flow from the producers back to the public (Transparency 9)

P. Communism--Economic and political system where the government leaders try to achieve equality by controlling almost all property and production and by deciding how and to whom goods and services are distributed

Examples: U.S.S.R., China

Q. Capitalism--Economic and political system characterized by elected representatives, limited government control, and freedoms such as the freedom of speech, the right to own property, right to choose a job, and the freedom of religion (Transparencies 13 and 14)

(NOTE: The term *capitalism* is often used interchangeably with the term *free enterprise* or *private enterprise*.)

Example: United States

R. Socialism--Economic and political system where the government controls most means of production

Example: Great Britain

S. Assets--Everything owned by or due a business

Example: Cash, money due it, inventory, buildings, patents

INFORMATION SHEET

T. Liabilities--All claims against a corporation

Example: Salaries, dividends, taxes, mortgages, loans

U. Natural resources--Land, water, lumber, minerals, fuel

V. Labor--People with skills to perform any kind of job well

W. Capital--Tools, machines, and buildings used to produce what is wanted

X. Management--Skill to direct and control all the other resources

Y. Technology--Ability to produce more goods and services with fewer resources

Z. Entrepreneur--Person who organizes and manages a business, assuming the risk for the sake of the profit

II. Resources necessary for production of goods and services (Transparencies 1, 2, and 3)

A. Natural resources

B. Labor

C. Capital

D. Management

III. Economic goals of American people (Transparencies 5, 6, and 7)

(NOTE: Goals may conflict. Therefore, Americans must try to achieve the best combination or "mix" of these goals. It is the privilege and responsibility of all Americans to know the issues, vote on bills, and elect officials at all levels of government who will help achieve these goals.)

A. Economic efficiency--Getting the most of time, energy, money, and abilities

B. Economic growth--Obtaining better education, highways, hospitals, postal service, fire and police protection, and recreational facilities for all Americans

C. Economic stability--Avoiding recessions, depressions, and inflation

INFORMATION SHEET

D. Economic security--Protecting against risks people run into in their daily lives

Example: Security may be obtained through individual savings and insurance programs, labor unions, and government programs such as social security, Medicare, FDIC, unemployment compensation, and farm price supports

E. Economic freedom--Going into business to produce whatever goods and services a person thinks he/she can sell at a profit

(NOTE: This also includes the freedom to leave a business.)

F. Economic justice--Applying economic policies to the ideas about what is right and wrong

Examples: Minimum wage laws, individuals being financially able to support churches and other charitable organizations

IV. Roles of government in the economy (Transparency 8)

A. Producer and consumer

(NOTE: Federal, state, and local governments are the biggest businesses in the country.)

Example: Government hires workers, buys raw materials, produces postal services, establishes universities, runs hospitals, provides police and fire protection, and collects taxes to pay for the production costs

B. Regulator and protector

(NOTE: The government in this role sets rules for banks and advertising; pollution controls; building codes; food, drug, and cosmetic standards; utility rates; and enforces wage and age requirements for employment.)

C. Promoter of economic goals of American people

V. Roles of individuals and businesses in the economy (Transparency 9)

A. Individuals and businesses save money

B. Savings are then invested in machines, tools, factories, stores, and offices

INFORMATION SHEET

C. Labor works to produce goods and services for themselves and others

D. Business provides wages, salaries, and stock dividends with which individuals can save and/or purchase goods and services

VI. Function of supply and demand schedules (Transparencies 10 and 11)

A. Demand and supply are the totals of individual decisions of millions of individual buyers and sellers

B. Total quantities of demand and supply, interacting with each other, determine the price of a good or service

VII. Things that determine the degree of elasticity of demand (Transparencies 10 and 11)

A. Whether a good or service is a necessity or luxury

(NOTE: Luxuries are more elastic than necessities. Thus, more luxury items would usually be demanded at lower prices.)

B. Availability and price of substitute products

Example: Apples may be substituted for oranges. If the price of apples went down, people might buy more apples and less oranges

C. Amount of money people are willing and able to spend

VIII. Ways prices influence the economy (Transparencies 12, 13, and 14)

A. Prices determine what will be produced by showing what is profitable and not profitable to sell

B. Prices determine how scarce resources will be used

C. Prices determine how something will be produced

Example: If an item can be made from plastic cheaper than it can be made from glass and if the consumers have no preference, the item would be made from plastic instead of glass to reduce the cost of production

D. Prices determine who can afford to get certain goods and services

INFORMATION SHEET

E. Individual's decisions are influenced by prices

Example: Price changes influence buying and selling habits and occupational decisions

F. People collectively determine prices by what they are willing to buy

(NOTE: This is known as the "economic vote.")

G. Producers try to learn how consumers will "vote" or purchase goods and services by studying past sales records and by conducting marketing studies

IX. Benefits of competition and profit

(NOTE: The average net profit in retailing is four percent or four cents out of every dollar of sales. The average return on investment for all industries is about eleven percent. Profits may be used to invest in new equipment, pay dividends, conduct research, and support educational and charitable organizations.)

A. Stimulate the development of new or improved goods and services

B. Cause scarce resources to be used as efficiently as possible

C. Reduce prices

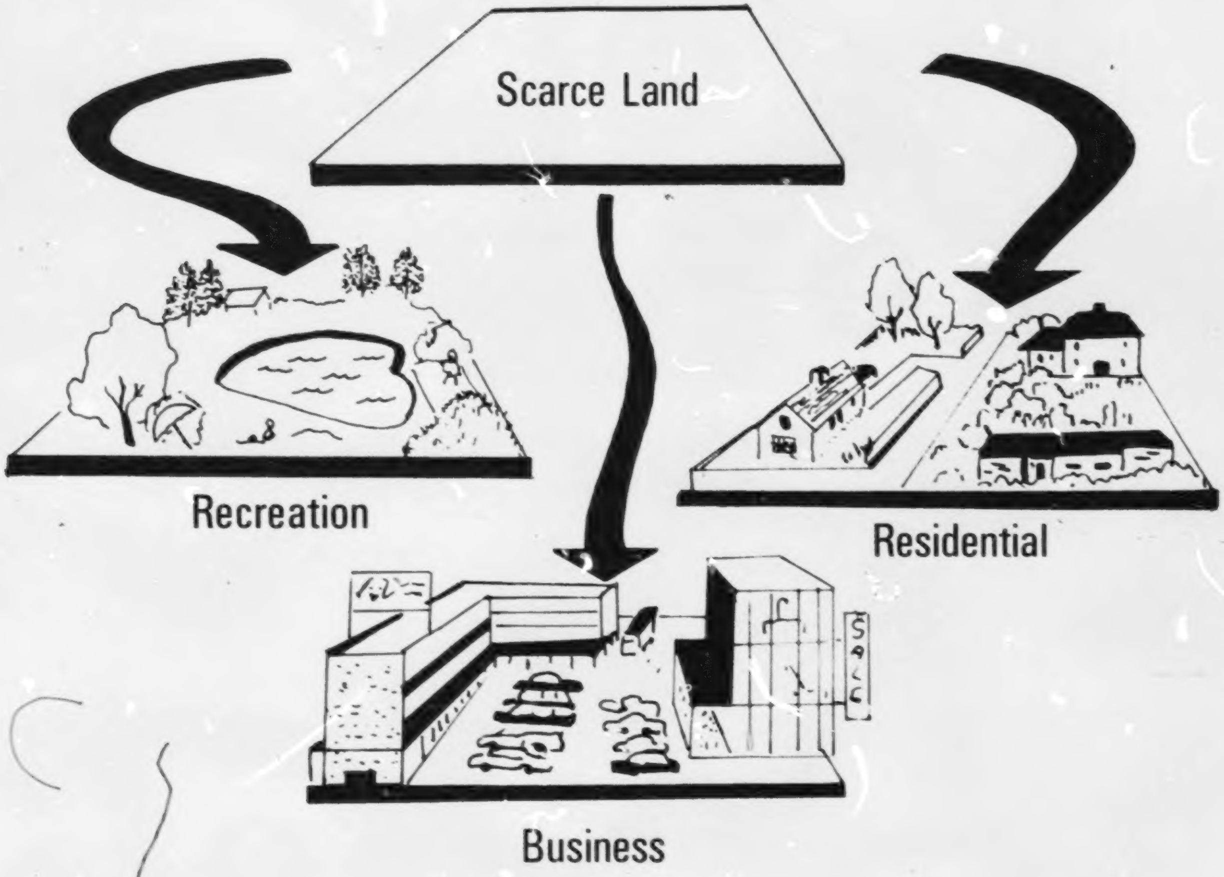
D. Motivate people to open new businesses

E. Create more new jobs

(NOTE: No profits = No capital = No tools = No jobs.)

F. Encourage more effective selling and promotion techniques

Alternate Uses for Scarce Land



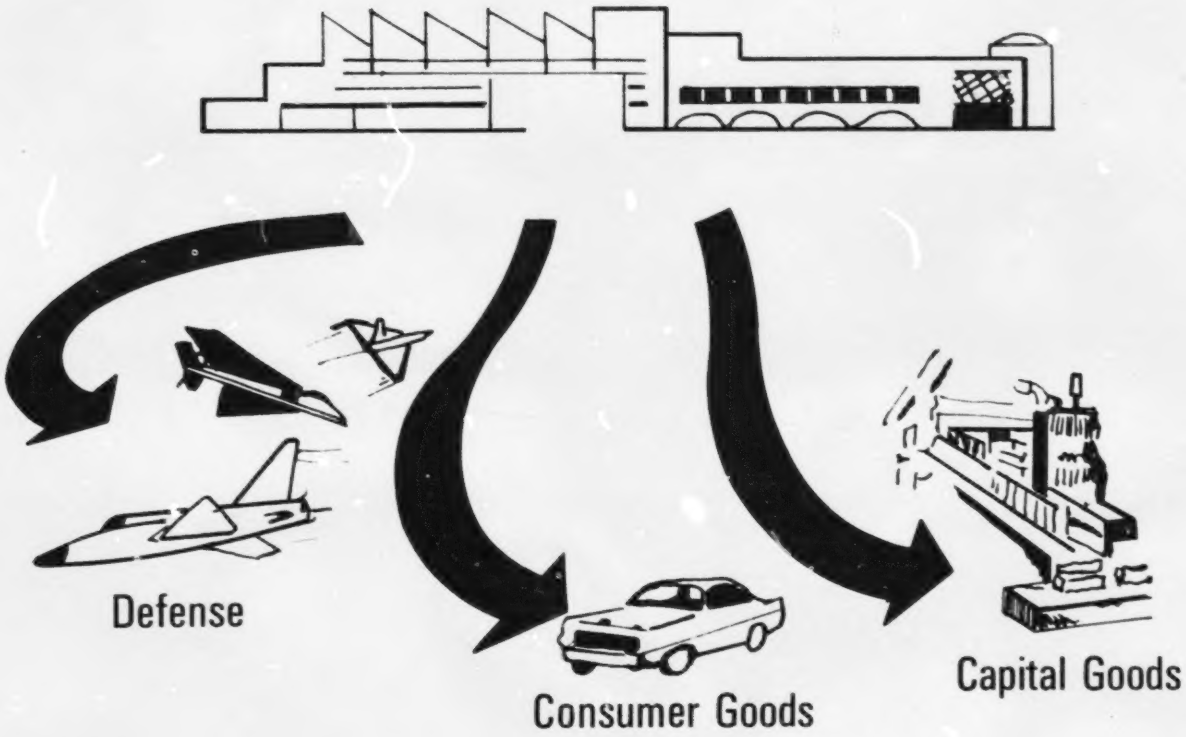
Scarce Land

Recreation

Residential

Business

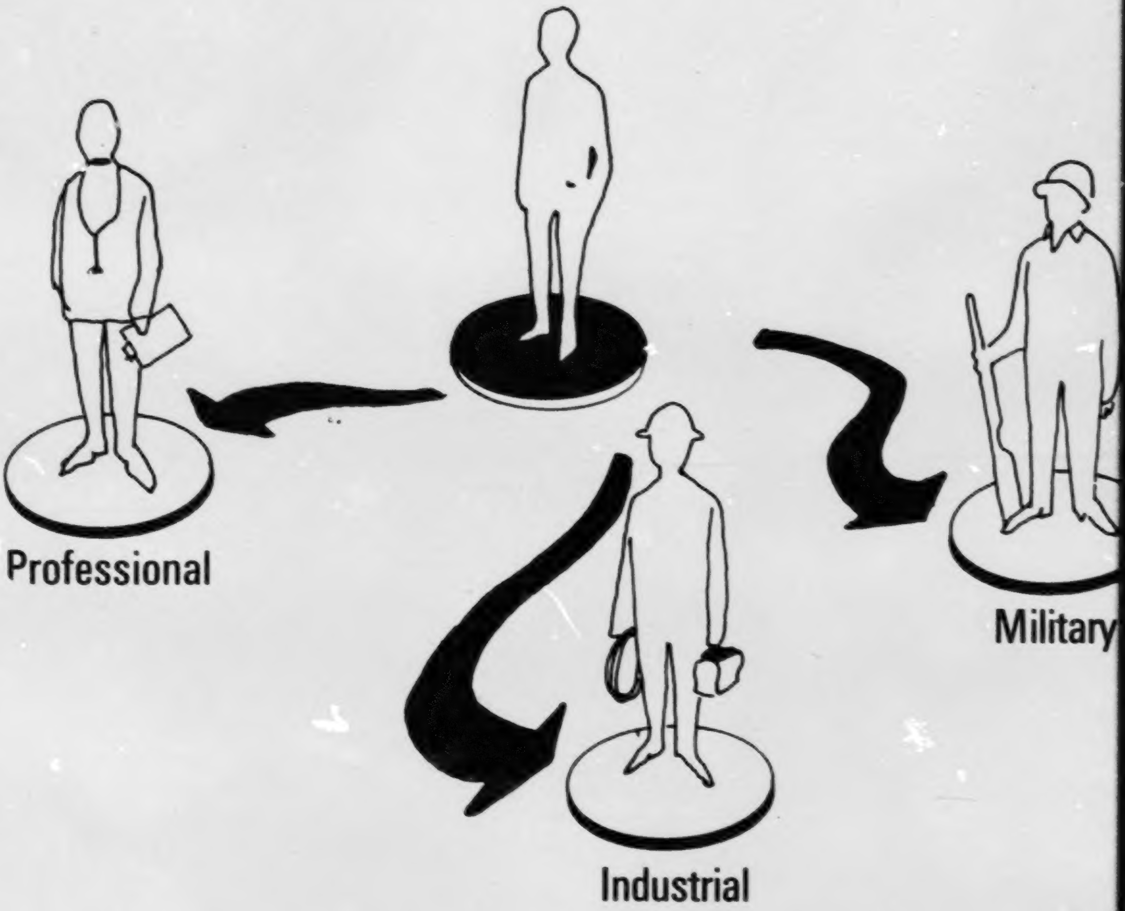
Alternate Uses for Scarce Capital


Defense
Consumer Goods
Capital Goods

TM 2

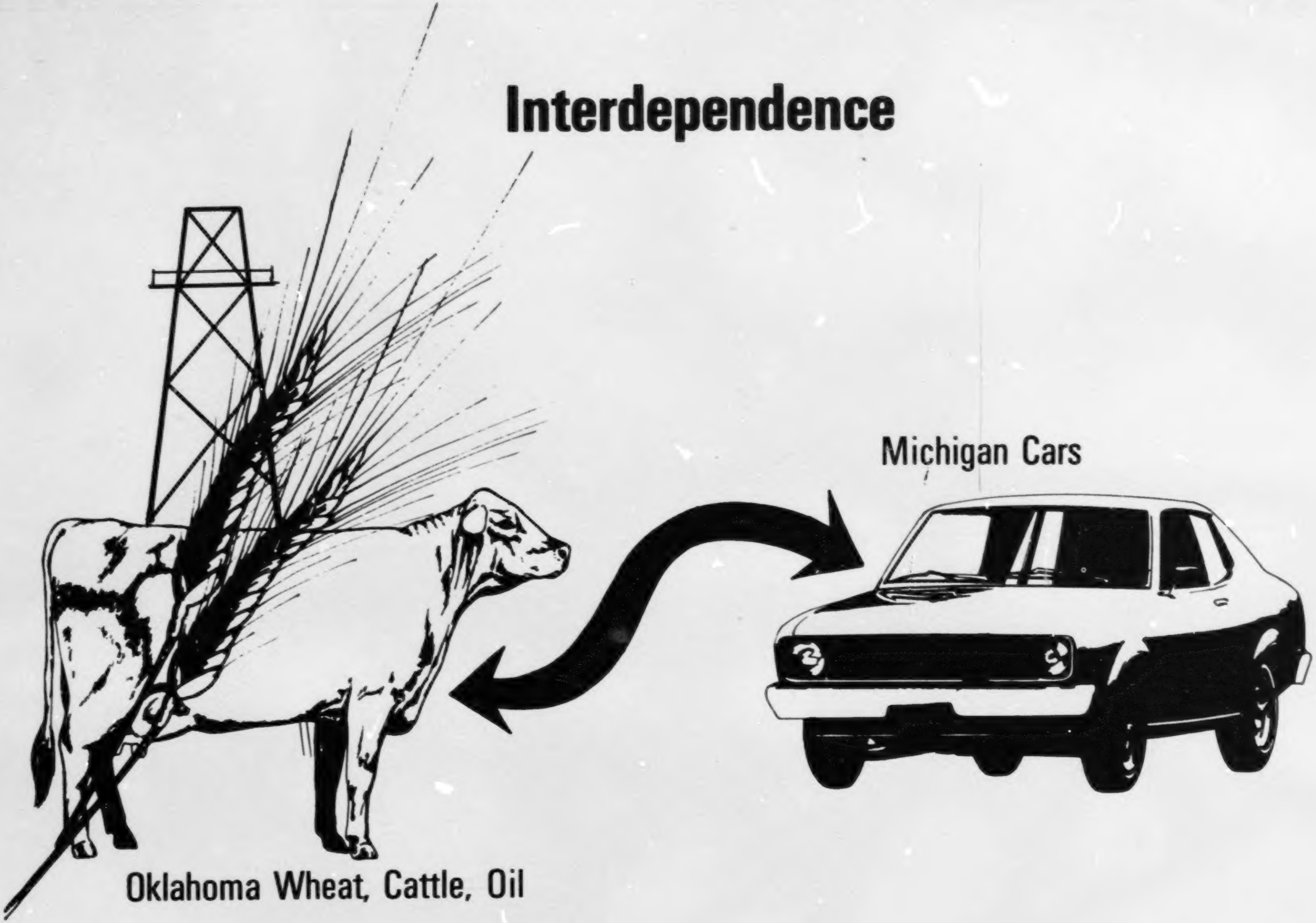
DE II - 13-1

Alternate Uses for Scarce Manpowe


Professional
Military
Industrial

TM 3

Interdependence



Michigan Cars

Oklahoma Wheat, Cattle, Oil

Desire for Stability vs Desire for Freedom

Desire For Stability
Desire For Freedom

Wage and price controls
to prevent
inflation . . . . may conflict with . . . Free decision-making
in the market by worker,
businessperson, and
consumer

Desire for Security vs Desire for Efficiency

Desire For Security

Desire For Efficiency

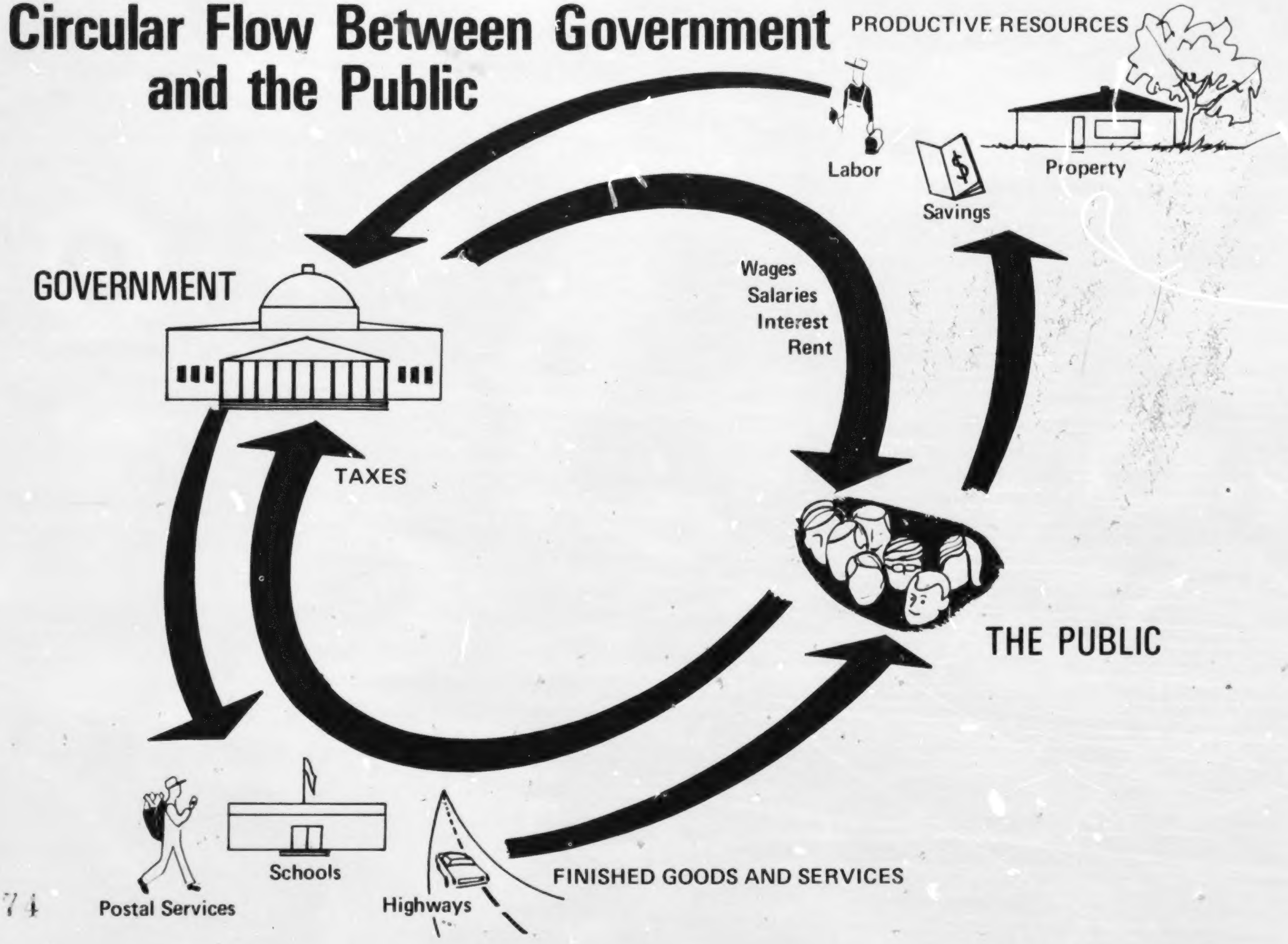
A tariff on foreign goods entering the U.S. to protect domestic producers . . . . may conflict with . . . free trade which leads to more effective use of productive resources and gives consumers lower prices

Desire for Growth vs Desire for Justice

Desire For Growth
Desire For Justice

Building interstate highways around cities to improve transportation . . . may conflict with . . . Business interests of motels, gas stations, and restaurants on old road through city

Circular Flow Between Government and the Public



PRODUCTIVE RESOURCES

Labor

Savings

Property

GOVERNMENT

Wages
Salaries
Interest
Rent

TAXES

THE PUBLIC

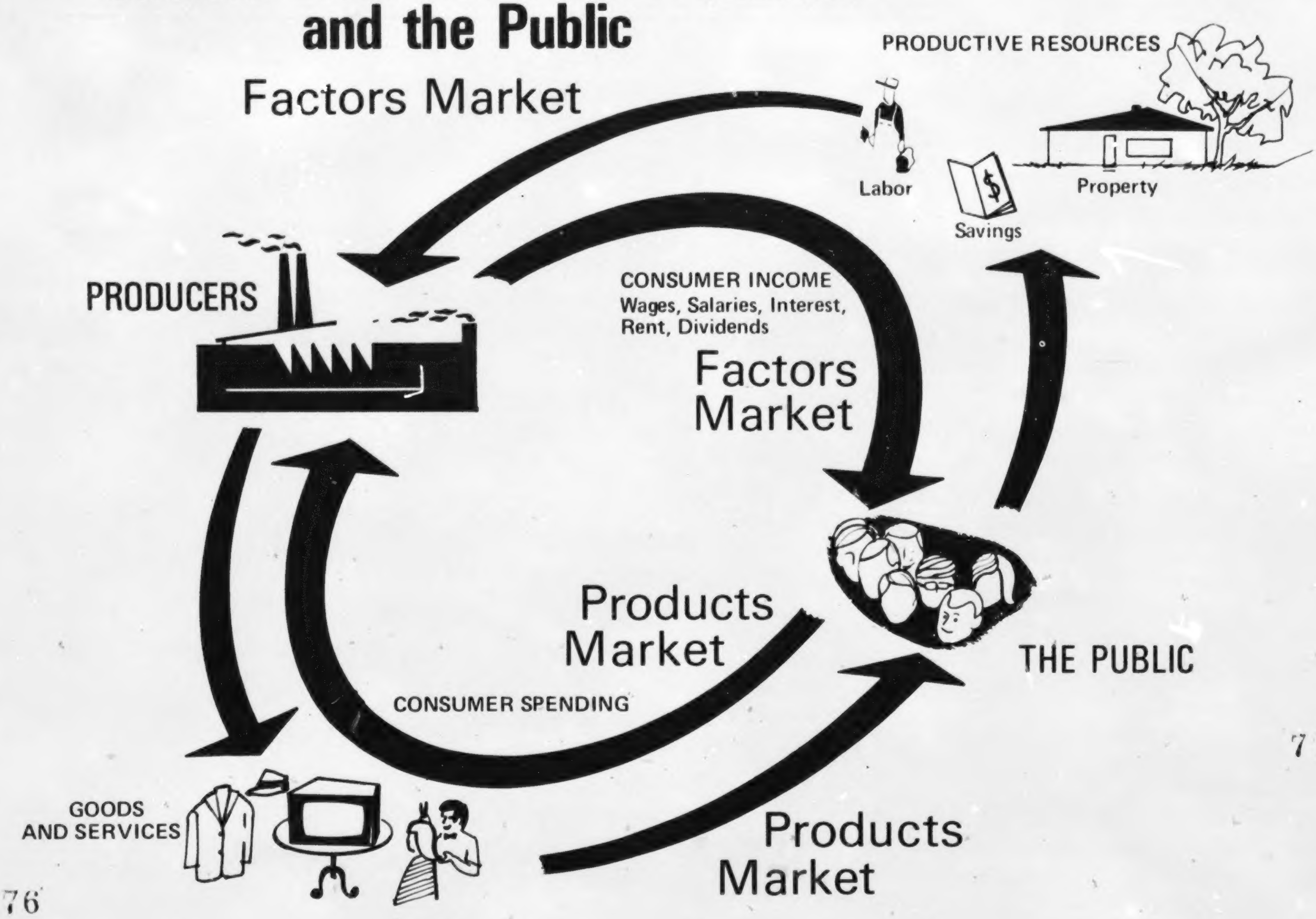
Postal Services

Schools

Highways

FINISHED GOODS AND SERVICES

Circular Flow Between Producers and the Public



Factors Market

PRODUCTIVE RESOURCES

Labor

Savings

Property

PRODUCERS

CONSUMER INCOME
Wages, Salaries, Interest, Rent, Dividends

Factors Market

Products Market

THE PUBLIC

CONSUMER SPENDING

GOODS AND SERVICES

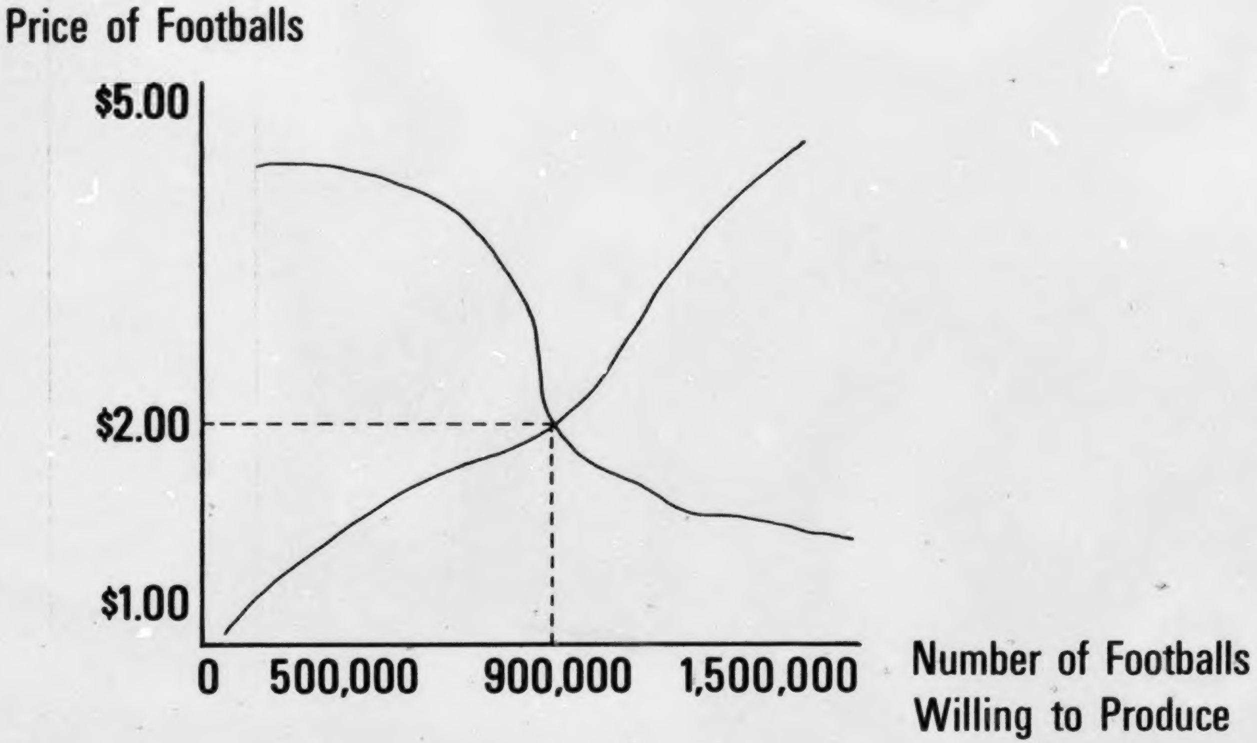
Products Market

Supply and Demand Schedule

Price of Phonograph Album	Number of Phonograph Albums Wanted at that Price	Number of Phonograph Albums Supplied at that Price
$5.00	500,000	1,000,000
$4.00	600,000	900,000
$3.50	700,000	700,000
$3.00	800,000	600,000
$2.00	1,000,000	400,000

Supply and demand determines price and number produced

Supply and Demand Curves

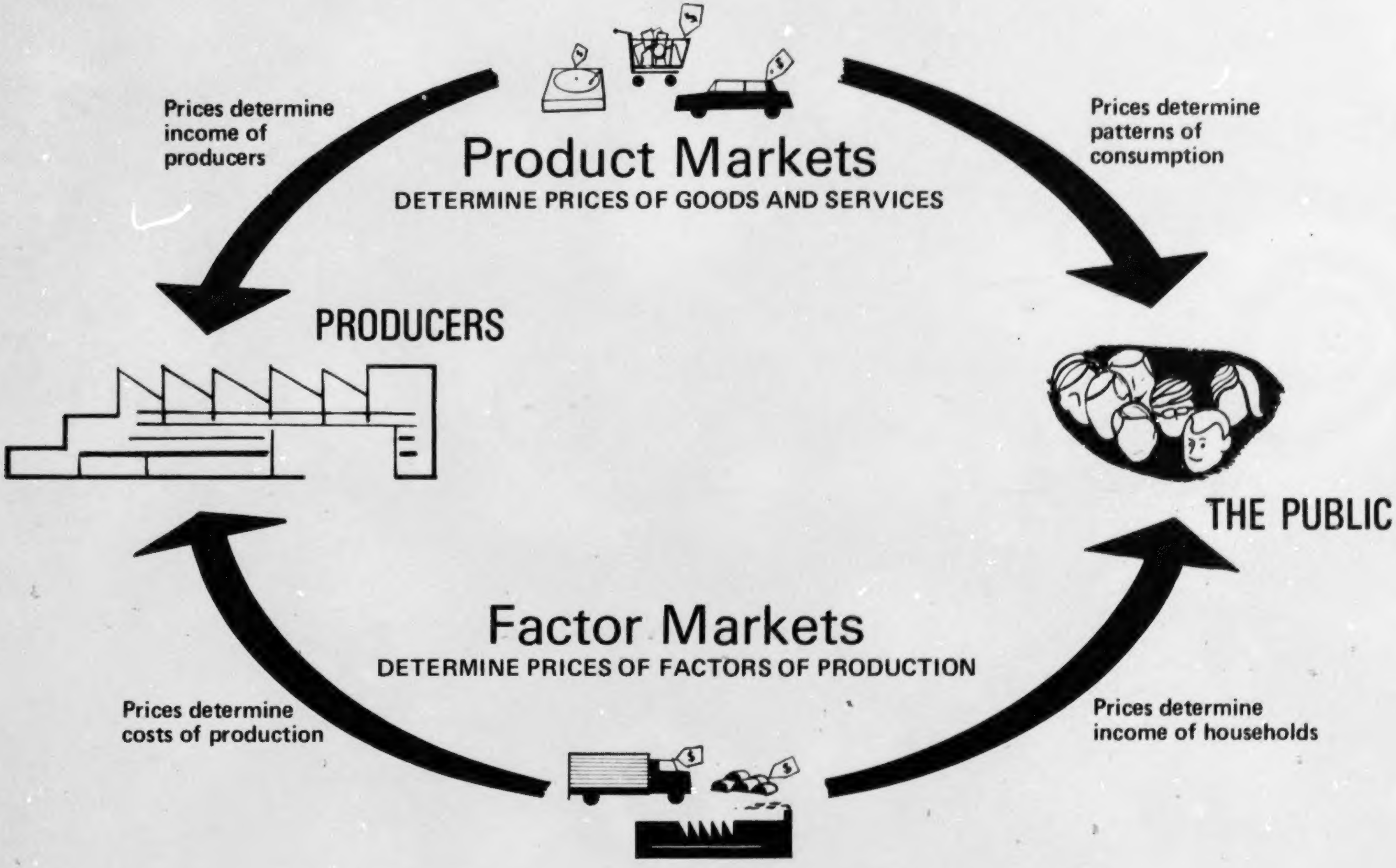


At this point in time, 900,000 footballs would be produced at a price of $2.00 each

TM 11

DE II - 31-1

Ways Prices Influence the Economy



Prices determine income of producers

Product Markets

DETERMINE PRICES OF GOODS AND SERVICES

Prices determine patterns of consumption

PRODUCERS

THE PUBLIC

Factor Markets

DETERMINE PRICES OF FACTORS OF PRODUCTION

Prices determine costs of production

Prices determine income of households

USA vs USSR Comparative Standard of Living

Approximate worktime required to buy commodities at state-fixed prices in Moscow and at retail stores in New York City, July 1, 1970:

Commodity	New York City	Moscow
White bread (1 lb.)	5 minutes	17 minutes
Potatoes (1 lb.)	2 minutes	4 minutes
Beef, rib roast (1 lb.)	41 minutes	137 minutes
Butter (1 lb.)	16 minutes	140 minutes
Sugar (1 lb.)	3 minutes	45 minutes
Milk (1 qt.)	6 minutes	24 minutes
Eggs (1 doz.)	12 minutes	93 minutes
Men's cotton shirt	1.7 hours	11.4 hours
Men's suit, wool, single-breasted, medium price range	26.3 hours	157.0 hours
Men's shoes, leather oxfords	6.0 hours	35.0 hours
Women's dress	5.6 hours	42.0 hours
Women's shoes, leather oxfords, medium price range	5.3 hours	33.0 hours
Women's nylon stockings	17.5 minutes	2.9 hours
Toilet soap (3 1/2 ounce)	2.0 minutes	16.3 minutes
Cigarettes, non-filter, regulars	8.5 minutes	15.1 minutes
Vodka (fifth)	1.2 minutes	4.4 hours

USA vs USSR Comparative Standard of Living

(Continued)

	USA	USSR
Population (1969)	203,213,000	240,567,000
Gross National Product-- Value of total goods and services produced per person (1970)	$4,757	$2,000
Telephones in use	115,222,000	12,000,000
Mail sent	79,968,000,000	7,584,000,000
Daily newspaper circulation	62,060,000	26,911,000
Radios	285,000,000	90,100,000
Televisions	81,000,000	30,744,000

ECONOMICS OF FREE ENTERPRISE
UNIT I

ASSIGNMENT SHEET #1--APPLICATION OF ECONOMIC PRINCIPLES

1. Greasy Drive-In was the only drive-in in Podunk City and the surrounding area. Most everybody in Podunk loved to eat hamburgers. Therefore, Greasy Drive-In could charge a high price for its hamburgers and get away with it.

   A new drive-in, Teanybopper Hangout, opened in the spring. They sold hamburgers for less than Greasy Drive-In. Consequently, Greasy Drive-In had to lower their prices or improve their hamburgers to justify the higher prices. What economic principle is involved in this situation?

2. a. Woody's Lumber Yard could sell 200 gallons of a peachy pink house paint during the year for seven dollars a gallon. If the demand for peachy pink house paint increased to 400 gallons per year, could the lumber yard increase the price per gallon?

   b. If the demand for peachy pink house paint decreased to 100 gallons per year, what could the lumber yard do to the price of peachy pink house paint to increase sales?

   c. If the price of tangerine orange house paint was lowered and many people began to purchase tangerine orange house paint instead of peachy pink house paint, what economic principle would be involved?

3. a. If the price of flour was raised 25 percent, would the demand for flour change much?

   b. If the price for sterling silverware was raised or lowered by 50 percent, would the demand for the silverware change much?

ECONOMICS OF FREE ENTERPRISE
UNIT I

ANSWERS TO ASSIGNMENT SHEET

1. Competition

2. a. Yes

   b. Lower the price

   c. Elasticity; the price of peachy pink house paint is elastic

3. a. No, flour is a necessity and would probably not be effected much by a change in price. In other words, most necessities are inelastic.

   b. Yes

ECONOMICS OF FREE ENTERPRISE
UNIT I

TEST

1. Match the terms on the right to the correct definitions by placing the appropriate numbers in the blanks provided. Terms and definitions are continued on the following pages.

_____a. Economic and political system where the government leaders try to achieve equality by controlling all property and production and by deciding how and to whom goods and services are distributed

_____b. Depending on others to provide most goods and services as a result of specialization

_____c. Study of how persons can best consume, produce, and distribute goods and services to try to satisfy their never-ending and ever-increasing wants

_____d. Economic and political system characterized by elected representatives, limited government control, and freedoms such as the freedom of speech, the right to own property, right to choose a job, and the freedom of religion

_____e. System where most production is done by privately owned corporations, partnerships, and private citizens in a free market; sometimes called private enterprise

_____f. Choosing among the variety of ways of consuming or using scarce resources to produce the goods and services wanted

_____g. Economic and political system where the government controls most means of production

_____h. Skill to direct and control all the other resources

1. Economics
2. Allocation
3. Opportunity cost
4. Specialization
5. Interdependence
6. Free enterprise
7. Product market
8. Natural resources
9. Supply
10. Demand
11. Elasticity
12. Inelasticity
13. Communism
14. Labor
15. Capitalism
16. Socialism
17. Economic system
18. Macro-economics
19. Capital
20. Micro-economics

_____i. True value of what individuals and societies must give up when they decide to use a resource to produce one good or service instead of another

_____j. Amount of a good or service a customer will want to buy at different prices at a particular time

_____k. Individuals or countries doing the jobs they are best fitted to perform instead of dividing their resources among many different jobs

_____l. Amount of goods or services that will be offered for sale at different prices

_____m. Tools, machines, and buildings used to produce what is wanted

_____n. Where goods and services are sold by producers to consumers who in turn pay money to the producers for these goods and services

_____o. Where the factors of production flow from the public to the producers and where money payments flow from the producers back to the public

_____p. Condition where demand is not affected much by a change in price

_____q. How much the demand for a good or service will increase if the price is lowered or how much the demand will decrease if the price is raised

_____r. Looking at the whole economy, such as the rate of growth for the country, inflation, total employment, and total production

_____s. People with skills to perform any kind of job well

_____t. Organized system whereby a country allocates resources among alternative uses

21. Factor market
22. Liabilities
23. Assets
24. Management
25. Technology
26. Entrepreneur

______u. Looking at an individual part of the economy, such as an individual consumer, individual business, or a market for a particular product

______v. Everything owned by or due a business

______w. All claims against a corporation

______x. Land, water, lumber, minerals, fuel

______y. Ability to produce more goods and services with fewer resources

______z. Person who organizes and manages a business, assuming the risk for the sake of profit

2. List the resources necessary for production of goods and services.

a.

b.

c.

d.

3. Match the economic goals of American people to statements describing each goal. An answer may be used more than once.

______a. Obtaining better education for all Americans

______b. Going into business to produce whatever goods and services a person thinks he/she can sell at a profit

______c. Getting the most of time, energy, money, and abilities

______d. Obtaining better highways

______e. Avoiding recessions, depressions, and inflation

______f. Obtaining better hospitals for all Americans

______g. Obtaining better postal service

1. Economic efficiency
2. Economic growth
3. Economic stability
4. Economic security
5. Economic freedom
6. Economic justice

_____h. Protecting against risks people run into in their daily lives

_____i. Obtaining better recreational facilities for all Americans

_____j. Applying economic policies to the ideas about what is right and wrong

_____k. Obtaining better fire and police protection for all Americans

4. List the roles of government in the economy.

   a.

   b.

   c.

5. Discuss the roles of individuals and businesses in the economy.

6. Discuss the function of supply and demand schedules.

7. List the things that determine the degree of elasticity of demand.

   a.

   b.

   c.

8. Select from the list below the ways prices influence the economy. Place an "X" in the correct blanks.

______a. Prices determine what will be produced by showing what is profitable and not profitable to sell

______b. Prices determine how scarce resources will be used

______c. Prices determine how something will be produced

______d. Prices determine who can afford to get certain goods and services

______e. People collectively determine prices by what they are willing to buy

______f. Individual's decisions are influenced by prices

______g. Producers try to learn how consumers will "vote" or purchase goods and services by studying past sales records and by conducting marketing studies

9. List the benefits of competition and profit.

a.

b.

c.

d.

e.

f.

10. Apply economic principles to business situations.

(NOTE: If the above activity has not been accomplished prior to the test, ask the teacher-coordinator when it should be completed.)

ECONOMICS OF FREE ENTERPRISE
UNIT I

ANSWERS TO TEST

1.

a.	13	f.	2	k.	4	p.	12	u.	20	z.	26
b.	5	g.	16	l.	9	q.	11	v.	23		
c.	1	h.	24	m.	19	r.	18	w.	22		
d.	15	i.	3	n.	7	s.	14	x.	8		
e.	6	j.	10	o.	21	t.	17	y.	25		

2.
   a. Natural resources
   b. Labor
   c. Capital
   d. Management

3.

a.	2	e.	3	i.	2
b.	5	f.	2	j.	6
c.	1	g.	2	k.	2
d.	2	h.	4		

4.
   a. Producer and consumer
   b. Regulator and protector
   c. Promoter of economic goals of American people

5. Discussion should include:
   a. Individuals and businesses save money
   b. Savings are then invested in machines, tools, factories, stores, and offices
   c. Labor works to produce goods and services for themselves and others
   d. Business provides wages, salaries, and stock dividends with which individuals can save and/or purchase goods and services

6. Discussion should include:
    a. Demand and supply are the totals of individual decisions of millions of individual buyers and sellers
    b. Total quantities of demand and supply, interacting with each other, determine the price of a good or service
7. a. Whether a good or service is a necessity or luxury
    b. Availability and price of substitute products
    c. Amount of money people are willing and able to spend
8. a, b, c, d, e, f, g
9. a. Stimulate the development of new or improved goods and services
    b. Cause scarce resources to be used as efficiently as possible
    c. Reduce prices
    d. Motivate people to open new businesses
    e. Create more new jobs
    f. Encourage more effective selling and promotion techniques
10. Evaluated to the satisfaction of the teacher-coordinator

GOVERNMENT AND THE AMERICAN MARKET
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to list areas of government involvement in the marketplace, ways to protect against big business and monopolies, and reasons the government's role has increased. He/she should be able to name the methods of spending tax money and select from a list reasons for striving to reach economic goals. He/she should also be able to discuss the characteristics of our modified free enterprise system, problems with government involvement, criteria for government involvement in the market, and ways the federal government influences the economy through fiscal policy and Federal Reserve bank policies. This knowledge will be evidenced by an overall score of eighty-five percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms associated with government and the American market to the correct definitions.
2. Discuss the characteristics of our modified free enterprise system.
3. Name the methods of spending tax money.
4. List areas of government involvement in the marketplace.
5. List reasons the government's role has increased.
6. Discuss problems with government involvement.
7. List ways to protect against big business and monopolies.
8. Discuss the criteria for government involvement in the market.
9. Select from a list the reasons for striving to reach economic goals.
10. Discuss ways the federal government influences the economy through Federal Reserve bank policies.
11. Discuss the ways the federal government influences the economy through fiscal policy.

GOVERNMENT AND THE AMERICAN MARKET
UNIT II

SUGGESTED ACTIVITIES

I. Teacher-Coordinator:
   - A. Provide student with objective sheet.
   - B. Give pretest using objective sheet.
   - C. Obtain guest speaker from local bank.
   - D. Provide student with information and assignment sheets.
   - E. Make transparencies.
   - F. Discuss unit and specific objectives.
   - G. Discuss information and assignment sheets.
   - H. Give test.
   - I. Reteach if necessary.
   - J. Test again until minimum standard is reached.

II. Student:
   - A. Read objective sheet.
   - B. Study information sheet.
   - C. Take notes.
   - D. Complete assignment sheet.
   - E. Take test(s).

INSTRUCTIONAL MATERIALS

I. Included in this unit:
   - A. Objective sheet
   - B. Information sheet
   - C. Transparency masters
     1. TM 1--How Tax Money Is Spent
     2. TM 2--Ways to Deal with Monopoly

        3. TM 3--Helping Growth
        4. TM 4--Limiting Growth
        5. TM 5--Federal Reserve System
        6. TM 6--Market Operations of Federal Reserve Banks

    D. Assignment Sheet #1--TV Terms Poll

    E. Test

    F. Answers to test

II. Reference--Calderwood, James D., and Fersh, George L. *Economics for Decision-Making.* New York: Macmillan Publishing Company, Inc., 1974.

GOVERNMENT AND THE AMERICAN MARKET
UNIT II

INFORMATION SHEET

I. Terms and definitions (Assignment Sheet #1)

A. Monopoly--Situation where only one seller exists in a marketing area

Example: Telephone company, natural gas company, and labor unions

B. Subsidize--Assist or give aid to farms, industries, and publicly owned facilities from tax money

C. Discretionary income--Money beyond what is needed for food, clothing, shelter, and taxes; may be spent or saved any way a person wants

D. Gross national product (GNP)--Total dollar value of all goods and services produced in one year; used to measure economic growth

E. Manhours--Number of workers multiplied by the number of hours they work; one way of measuring productivity in the United States

F. Puritan ethic--Belief in the virtues or benefits of hard work, thrift, and self-reliance

G. Ethics--Standards of conduct; moral standards

H. Conspicuous consumption--Spending for things not needed in order to "show off"

I. Depression--Time when the natural resources, labor, and capital of the nation are not fully used, people are unemployed, and many businesses fail

(NOTE: The Great Depression of 1930-1941 was the longest and worst depression in American history.)

J. Recession--Similar to a depression but shorter and milder or only affecting certain industries

K. Inflation--Noticeable rise in the average of all prices

(NOTE: This is particularly hard on retired people and other people with fixed incomes. It also decreases the buying power of people's savings.)

INFORMATION SHEET

L. Fixed income--Income which does not rise with increases in cost of living

M. Consumer Price Index--Measures changes in prices of several hundred commodities and services purchased by urban wage earners and clerical workers

(NOTE: This includes the principal items of food, clothing, rent, transportation, medical care, recreation, entertainment, and other typical family expenditures.)

N. Fractional reserve requirement--System where only a portion of each dollar on deposit is kept on reserve

Example: If a commercial bank is required by the Federal Reserve Bank to keep 10% in reserve, the commercial bank can potentially loan up to $10,000 by keeping a $1,000 deposit in reserve

$\$1{,}000 = .10 \text{ of } x$
$\$1{,}000 \div .10 = \$10{,}000$

O. Federal Reserve System--Twelve banks which do business only with commercial banks, the United States government, and foreign governments

P. Discount rate policy--Amount of interest charged by a Federal Reserve bank on loans to commercial banks

Q. Quota--Limit on the amount of goods that can be imported each year

R. Fiscal policy--Methods the federal government uses to handle taxes, expenditures, and management of the national debt

S. Fiscal year--Way the government keeps its books (budget); is often abbreviated FY

T. Budget deficit--When the total amount spent by the government is more than the total amount of tax money brought in

U. Efficient--Not wasteful

V. Commercial bank--State or national bank which does business with the general public

(NOTE: The main difference between commercial banks and savings and loan associations is that commercial banks offer checking account services.)

W. Modify--Limit, change, or qualify

INFORMATION SHEET

X. Depreciation allowance--Decreasing value of machines and equipment each year until they are replaced

Y. Marketplace--General term for all trade or economic activity

Z. Incentive--Motivation, encouragement, stimulation

II. Characteristics of our modified free enterprise system

A. Permits local, state, and federal governments to play a role in how resources will be used

B. Allows some monopolies to exist

Example: Telephone company

C. Has profit motive as main incentive

D. Maintains efficiency through competition in the marketplace

E. Determines kinds and levels of production mainly by consumer purchases

F. Provides rights to own property, to enter or leave a job, and to make contracts

III. Methods of spending tax money (Transparency 1)

A. Buying goods and services for the nation

Example: Building roads, paying teachers, and defending the country

B. Transferring money to people without expecting goods or services in return

Example: Social security benefits to the disabled, retired, widowed, and orphaned; veterans benefits; subsidies to farms and vital industries; and welfare

IV. Areas of government involvement in the marketplace

(NOTE: When the government intervenes in the market, the market does not operate solely according to the laws of supply and demand.)

A. Floor (minimum) and ceiling (maximum) boundaries set on wages and prices

(NOTE: Boundaries may affect unemployment.)

INFORMATION SHEET

B. Regulations on public utilities

Examples: Airlines, railroads, telephone company, and gas and electricity rates

C. Tariffs on imports to encourage the sale of American goods

V. Reasons the government's role has increased

A. Larger populations and movement to larger cities require more goods and services

Example: Sewers, street lights, garbage trucks, health regulations, building and zoning regulations, training of people whose skills have become useless because of automation, training people with economic disadvantages, and pollution controls

(NOTE: Such services are often necessary before industry will locate in a city.)

B. Need for national defense has increased

(NOTE: Major industries, such as aerospace and electronics, depend heavily on government contracts. As a result, many cities with defense industries, such as San Diego, California, Midwest City, Oklahoma, and Honolulu, Hawaii, depend on government defense activity. However, war and defense are not required for full employment to take place in the long run as these resources could be put into producing other products during peace time.)

C. Desire for justice

Example: Low rent housing, equal employment opportunities for all sexes and races

D. Desire for economic security

Example: Medicare; Federal Deposit Insurance Corporation (FDIC) to insure bank accounts; actions to try to prevent depressions, recessions, inflation, and unemployment

VI. Problems with government involvement

A. Government is sometimes not as efficient as private business because government agencies do not have to be concerned with profit and loss

INFORMATION SHEET

1. Government agencies do not have to use resources wisely in order to make a profit or to compete
2. Civil service safeguards lessen the influence of politics on government employees but may make it difficult to fire the few people who may not do a job well

B. People often lose certain freedoms of choice

VII. Ways to protect against big business and monopolies (Transparency 2)

(NOTE: Big business is neither good nor bad. The accumulation of large amounts of capital may often be put to good use.)

A. Anti-trust laws

B. Direct regulations of public utilities by federal and state commissions

Example: Interstate Commerce Commission for railroads and Federal Power Commission for power plants crossing state lines

VIII. Criteria for government involvement in the market

(NOTE: Thomas Jefferson said, "That government governs best which governs least.")

A. When profit is not the goal and a good or service is vitally needed

Example: Education

B. When services should be available to all regardless of their ability to pay

Example: Fire protection

IX. Reasons for striving to reach economic goals (Transparencies 3 and 4)

A. Raise the standard of living for more people

(NOTE: Growth while preserving the natural environment is the goal.)

B. Have full employment

(NOTE: The increase in population and new technological advances create a need for more people with skills and less need for people with little or no skill. Full employment does not mean that 100% of those persons able to work are employed. Four percent or more of the labor force may not be seeking employment for many reasons, such as being enrolled in school.)

INFORMATION SHEET

C. Compete in international market with countries such as Japan and Germany

D. Meet the challenge of communism to replace the United States as the world's leading power

E. Provide assistance and guidance to developing countries

X. Ways federal government influences the economy through Federal Reserve bank policies

A. Reserve policy (Transparency 5)

1. Promotes growth and stability by managing the supply or amount of money in the nation

2. Manages the money supply by influencing the amount of money commercial banks must keep in reserve and how much money commercial banks can loan

Example: If the Federal Reserve bank requires its commercial banks to hold more money in reserve, then there will be less money available from commercial banks for loans and investments. When it becomes necessary for less money to be in circulation, this is called a tight money situation

B. Discount policy

1. Commercial banks may increase their ability to make loans to the public by increasing the amount of money held in their bank's reserve

2. Amount of money in reserve may be increased by commercial banks borrowing from a Federal Reserve bank

3. Discount rate (interest) charged by the Federal Reserve bank for loans to commercial banks tells what the federal government feels should be done to help the economy

a. High discount rates increase the costs to commercial banks and mean that less lending should be done by commercial banks to the public

b. Low rates decrease the costs to commercial banks and mean that more lending by commercial banks to the public should be done

INFORMATION SHEET

C. Market operations (Transparency 6)

1. Reserves in commercial banks may be increased by the federal government buying government securities (bonds) from individuals and businesses who may have invested in government securities

2. Company which sold the government securities would place the money received from the sale in a commercial bank

3. Commercial bank can make more loans and investments because its reserves have been increased by the company's deposit

XI. Ways the federal government influences the economy through fiscal policy

A. President presents to Congress each January a budget which estimates tax collections and government spending for the new fiscal year

B. Congress passes bills to agree or disagree with various parts of the budget

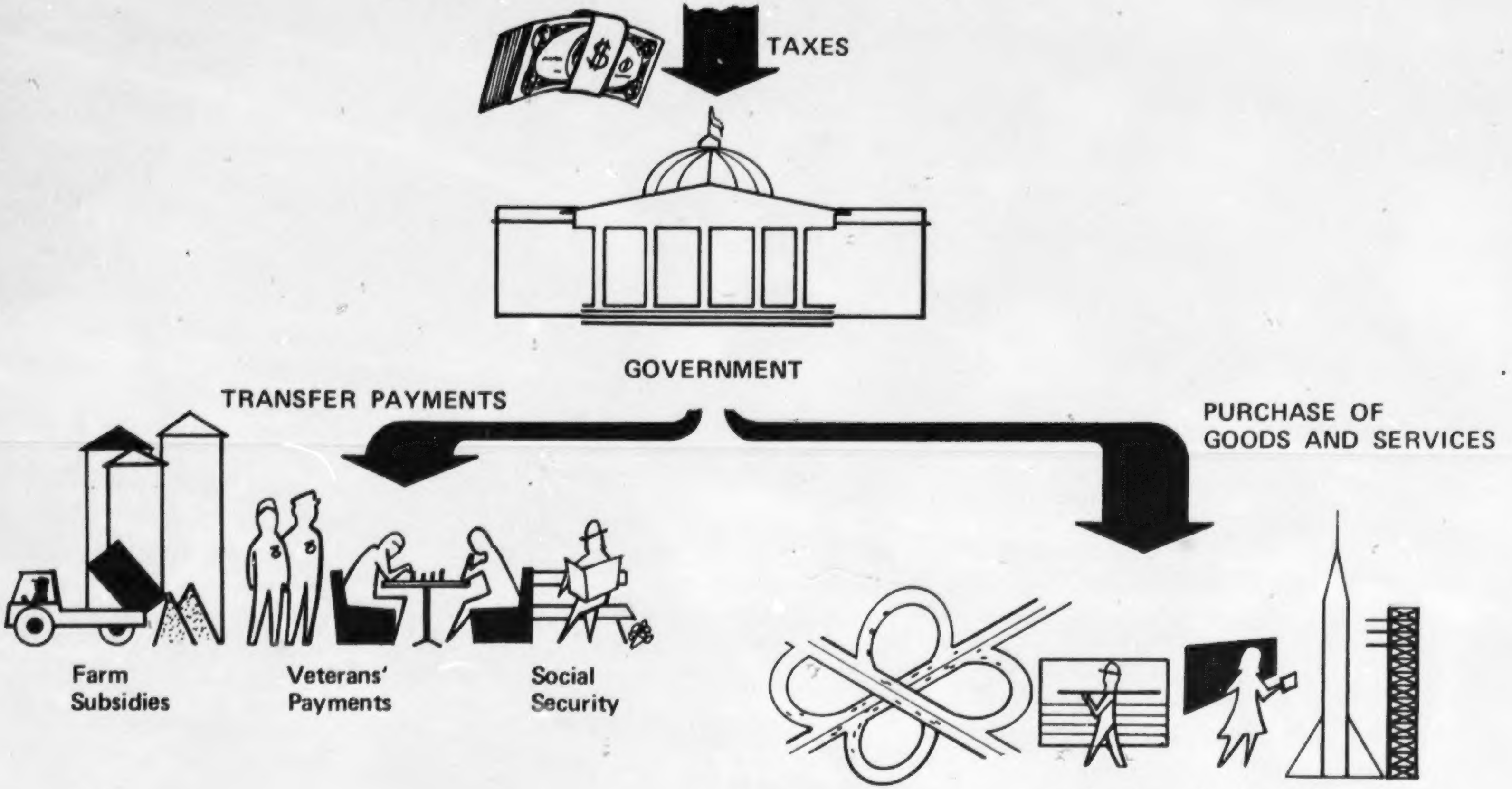
C. Federal government may borrow money to cover the national debt by selling bonds and other securities to the public

Example: An insurance company or company pension fund may buy government bonds

D. Federal government may have to slow down the economy during inflation by increasing taxes and decreasing federal spending

(NOTE: At times, the government may have to stimulate the economy during depresssion or recession.)

How Tax Money Is Spent



TAXES

GOVERNMENT

TRANSFER PAYMENTS

PURCHASE OF
GOODS AND SERVICES

Farm Subsidies

Veterans' Payments

Social Security

Road Building

School Building

Teachers' Salaries

Defense Spending

TM 1

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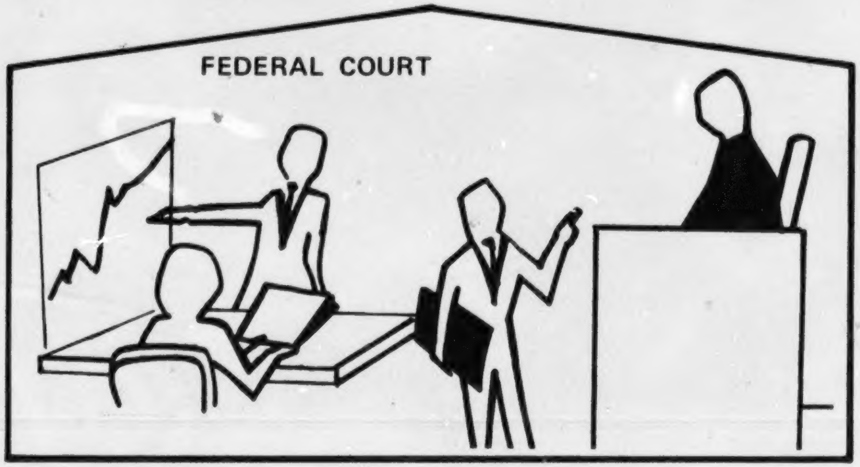
Ways to Deal with Monopoly

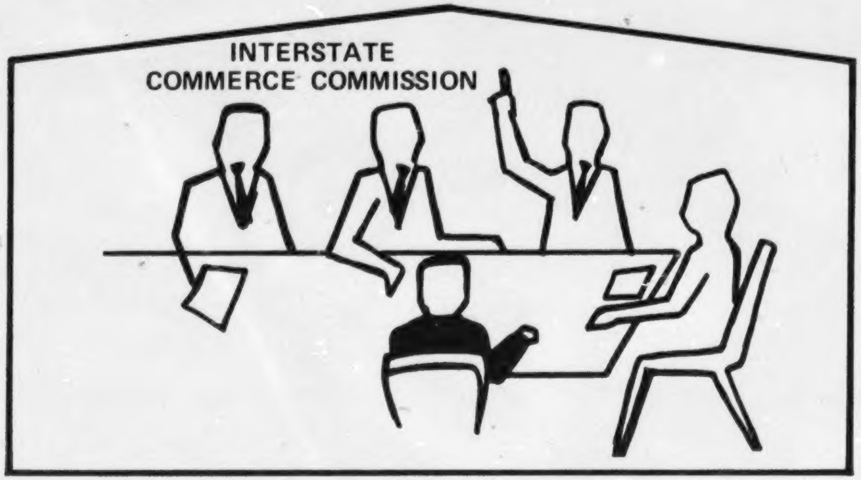
Antitrust Laws

Monopolists are prosecuted in federal courts by the U.S. Department of Justice

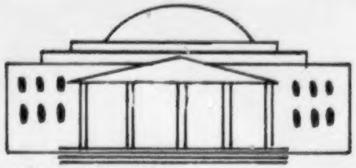

FEDERAL COURT

Direct Regulation

Federal and state commissions regulate rates of public utilities

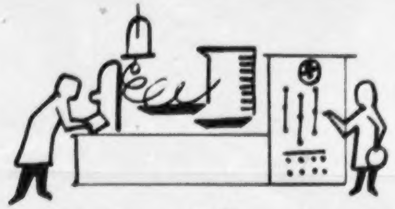

INTERSTATE
COMMERCE COMMISSION

Helping Growth



Stable Government

Encourages business, incentives for citizens



Research and Development

Quantities of new improved products at less cost

Modern Tools

Rising productivity, less drain on human energy

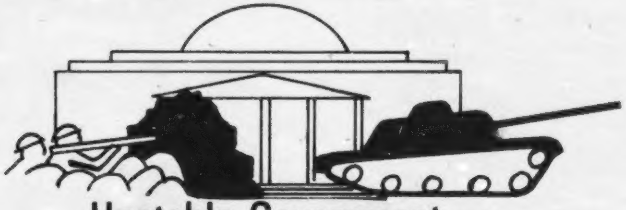
Mass Production

Abundant supply of low-priced goods

Mass Education

Increased supply of skilled labor

Limiting Growth

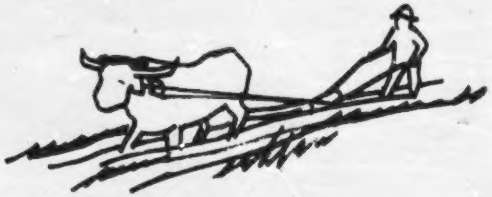


Unstable Government

Discourages business, uncertainties for citizens

Limited Technology

Limited products and higher prices



Primitive Tools

Low productivity, heavy drain on human energy

Production By Hand

Small supply of high-priced goods

Lack of Education

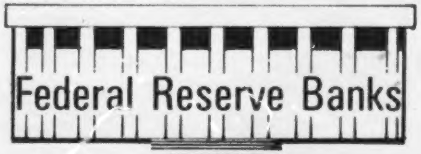
Shortage of labor skills

TM 4

DE II - 69-1

Federal Reserve System

Federal Reserve Board


Federal Reserve Banks

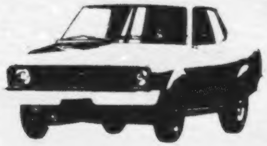
Commercial Banks

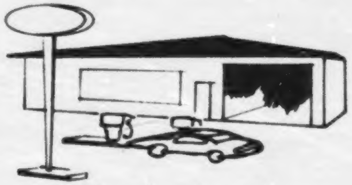
Bank and Trust

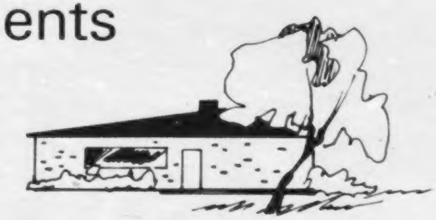
1st/National Bank Drive-In Window

1st/State Bank

Loans and Investments


Cars


Businesses


Homes

TM 5

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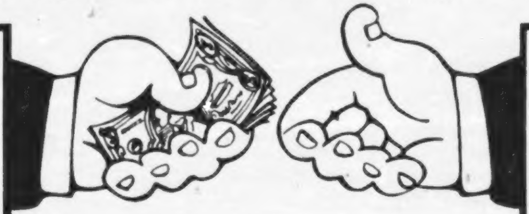
Market Operations of Federal Reserve Banks

FEDERAL BANK GIVES INSURANCE COMPANY $1,000,000 FOR GOVERNMENT BONDS

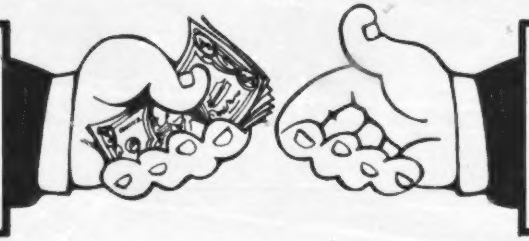
Federal Reserve Bank



Insurance Company

INSURANCE COMPANY PLACES $1,000,000 IN COMMERCIAL BANKS

Insurance Company



First State Bank

COMMERCIAL BANKS CAN MAKE $10,000,000 IN LOANS

First State Bank

TM 6

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GOVERNMENT AND THE AMERICAN MARKET
UNIT II

ASSIGNMENT SHEET #1--TV TERMS POLL

Directions: Watch a national television news broadcast and read the newspaper for a week. Take notes on the number of times the terms listed below are mentioned. Make notes on any new economic terms you do not understand and discuss them in class.

1. Economics
2. Allocation
3. Economic system
4. Opportunity cost
5. Micro-economics
6. Macro-economics
7. Specialization
8. Interdependence
9. Free enterprise
10. Demand
11. Supply
12. Elasticity
13. Inelasticity
14. Product market
15. Factor market
16. Communism
17. Capitalism
18. Socialism
19. Fractional reserve requirement
20. Monopoly
21. Subsidize
22. Fixed income
23. Discretionary income
24. Gross national product
25. Manhours
26. Puritan ethic
27. Conspicuous consumption
28. Depression
29. Recession
30. Inflation
31. Consumer Price Index
32. Federal Reserve System
33. Discount rate policy
34. Quota
35. Fiscal year
36. Budget deficit
37. Efficient
38. Commercial bank
39. Modify
40. Fiscal policy
41. Depreciation allowance
42. Assets
43. Liabilities
44. Marketplace
45. Ethics
46. Incentive

GOVERNMENT AND THE AMERICAN MARKET
UNIT II

TEST

1. Match the terms on the right to the correct definitions on the left by placing the appropriate numbers in the blanks provided. Terms and definitions are continued on the following page.

_____a. Limit on the amount of goods that can be imported each year

_____b. Methods the federal government uses to handle taxes, expenditures, and management of the national debt

_____c. Way the government keeps its books (budget); is often abbreviated FY

_____d. When the total amount spent by the government is more than the total amount of tax money brought in

_____e. Not wasteful

_____f. State or national bank which does business with the general public

_____g. Limit, change, or qualify

_____h. Assist or give aid to farms, industries, and publicly owned facilities from tax money

_____i. Time when the natural resources, labor, and capital of the nation are not fully used, people are unemployed, and many businesses fail

_____j. Spending for things not needed in order to "show off"

_____k. Belief in the virtues or benefits of hard work, thrift, and self-reliance

1. Modify
2. Discount rate policy
3. Depression
4. Commercial bank
5. Federal Reserve System
6. Conspicuous consumption
7. Efficient
8. Fractional reserve requirement
9. Puritan ethic
10. Budget deficit
11. Consumer Price Index
12. Manhours
13. Fiscal year
14. Inflation
15. Gross national product (GNP)
16. Fiscal policy
17. Recession

______l. Number of workers multiplied by the number of hours they work; one way of measuring productivity in the United States

______m. Income which does not rise with increases in cost of living

______n. Total dollar value of all goods and services produced in one year; used to measure economic growth

______o. Money beyond what is needed for food, clothing, shelter, and taxes; may be spent or saved any way a person wants

______p. Similar to a depression but shorter and milder or only affecting certain industries

______q. Situation where only one seller exists in a marketing area

______r. Amount of interest charged by a Federal Reserve bank on loans to commercial banks

______s. General term for all trade or economic activity

______t. Twelve banks which do business only with commercial banks, the United States government, and foreign governments

______u. System where only a portion of each dollar on deposit is kept on reserve

______v. Measures changes in prices of several hundred commodities and services purchased by urban wage earners and clerical workers

______w. Noticeable rise in the average of all prices

______x. Decreasing value of machines and equipment each year until they are replaced

______y. Standards of conduct; moral standards

______z. Motivation, encouragement, stimulation

18. Discretionary income
19. Quota
20. Subsidize
21. Monopoly
22. Depreciation allowance
23. Fixed income
24. Marketplace
25. Ethics
26. Incentive

2. Discuss the characteristics of our modified free enterprise system.

3. Name the methods of spending tax money.

   a.

   b.

4. List areas of government involvement in the marketplace.

   a.

   b.

   c.

5. List reasons the government's role has increased.

   a.

   b.

   c.

   d.

6. Discuss problems with government involvement.

7. List ways to protect against big business and monopolies.

   a.

   b.

8. Discuss the criteria for government involvement in the market.

9. Select from the list below the reasons for striving to reach economic goals. Place an "X" in the correct blanks.

_____a. Raise the standard of living for the upper classes

_____b. Have full employment

_____c. Compete in international market with countries such as Japan and Germany

_____d. Meet the challenge of communism to replace the United States as the world's leading power

_____e. Provide assistance and guidance to developing countries

10. Discuss ways the federal government influences the economy through the Federal Reserve bank policies.

a. Reserve policy

b. Discount policy

c. Market operations

11. Discuss ways the federal government influences the economy through fiscal policy.

GOVERNMENT AND THE AMERICAN MARKET
UNIT II

ANSWERS TO TEST

1. a. 19
b. 16
c. 13
d. 10
e. 7
f. 4
g. 1
h. 20
i. 3
j. 6
k. 9
l. 12
m. 23
n. 15
o. 18
p. 17
q. 21
r. 2
s. 24
t. 5
u. 8
v. 11
w. 14
x. 22
y. 25
z. 26

2. Discussion should include:

a. Permits local, state, and federal governments to play a role in how resources will be used

b. Allows some monopolies to exist

c. Has profit motive as main incentive

d. Maintains efficiency through competition in the marketplace

e. Determines kinds and levels of production mainly by consumer purchases

f. Provides rights to own property, to enter or leave a job, and to make contracts

3. a. Buying goods and services for the nation

b. Transferring money to people without expecting goods or services in return

4. a. Floor (minimum) and ceiling (maximum) boundaries set on wages and prices

b. Regulations on public utilities

c. Tariffs on imports to encourage the sale of American goods

5. a. Larger populations and movement to larger cities require more goods and services

b. Need for national defense has increased

c. Desire for justice

d. Desire for economic security

6. Discussion should include:
   - a. Government is sometimes not as efficient as private business because government agencies do not have to be concerned with profit and loss
     - 1) Government agencies do not have to use resources wisely in order to make a profit or to compete
     - 2) Civil service safeguards lessen the influence of politics on government employees but may make it difficult to fire the few people who may not do a job well
   - b. People often lose certain freedoms of choice

7. a. Anti-trust laws
   - b. Direct regulations of public utilities by federal and state commissions

8. Discussion should include:
   - a. When profit is not the goal and a good or service is vitally needed
   - b. When services should be available to all regardless of their ability to pay

9. b, c, d, e

10. Discussion should include:
    - a. Reserve policy
      - 1) Promotes growth and stability by managing the supply or amount of money in the nation
      - 2) Manages the money supply by influencing the amount of money commercial banks must keep in reserve and how much money the commercial banks can loan
    - b. Discount policy
      - 1) Commercial banks may increase their ability to make loans to the public by increasing the amount of money held in their bank's reserve
      - 2) Amount of money in reserve may be increased by commercial banks borrowing from a Federal Reserve bank
      - 3) Discount rate (interest) charged by the Federal Reserve bank for loans to commercial banks tells what the federal government feels should be done to help the economy
        - a) High discount rates increase the costs to commercial banks and mean that less lending should be done by commercial banks to the public
        - b) Low rates decrease the costs to commercial banks and mean that more lending by commercial banks to the public should be done

c. Market operations

   1) Reserves in commercial banks may be increased by the federal government buying government securities (bonds) from individuals and businesses who may have invested in government securities

   2) Company which sold the government securities would place the money received from the sale in a commercial bank

   3) Commercial bank can make more loans and investments because its reserves have been increased by the company's deposit

11. Discussion should include:

a. President presents to Congress each January a budget which estimates tax collections and government spending for the new fiscal year

b. Congress passes bills to agree or disagree with various parts of the budget

c. Federal government may borrow money to cover the national debt by selling bonds and other securities to the public

d. Federal government may have to slow down the economy during inflation by increasing taxes and decreasing federal spending